DOCUMENT RESUME

ED 201 041 EA 013 468

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TITLE	Information Analysis for School Board Planning and Management: Dufferin Board of Education. Volume I: Project Description. Volume II: Technical Appendices--School Level. Volume III: Technical Appendices--Central Board Level. Final Report.
SPONS AGENCY	Dufferin Board of Education, Ontario.; Ontario Inst. for Studies in Education, Toronto. Dept. of Educational Administration.
PUB DATE	Mar 77
NOTE	302p.; Appendix D may not reproduce clearly due to broken print of original document.
EDRS PRICE	MF01/PC13 Plus Postage.
DESCRIPTORS	Boards of Education; *Decision Making; Elementary Secondary Education; Foreign Countries; *Information Needs; *Management Information Systems; Planning; Principals; Superintendents
IDENTIFIERS	Ontario

ABSTRACT

In analyzing the managerial decisions at the central office of the Dufferin (Ontario) county board of education, this project sought to obtain the data needed to design an integrated management information system. A major component of the study was identifying users and their information needs and relating information to three different levels of decision-making: operational control, management (tactical) control, and strategic planning. Intensive interviews with board officials, superintendents, and elementary and secondary principals, along with the compilation of lists of major decision functions, provided the data for the study, which includes analyses of both board- and school-level decision-making. Among the results of the study were a systems analysis of the board's activities, an integrated, comprehensive list of functions and specific areas of decision-making, and the identification of information channels that contribute to decisions at the central office. Appended are lists of joint and individual decision functions of board members and principals, their information needs, and flow charts. (Author/WD)

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FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume I: Project Description

Susan Padro

March, 1977

Department of Educational Planning

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

EA 013 168
Vol. I

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TABLE OF CONTENTS

Volume I: Project Description

	Page
PREFACE	i
INTRODUCTION	1
OBJECTIVE AND SCOPE OF THE STUDY	1
APPROACH OF THE STUDY	2
SUMMARY OF OUTCOMES	6
ANALYSIS PROCEDURES AND OUTPUTS	7
A. School Level	8
Elementary Schools	8
Secondary Schools	10
B. Central Board Level	15
RESULTS OF THE STUDY	24
RECOMMENDATIONS FOR IMPLEMENTATION	25

Volume II: Technical Appendices - School Level

APPENDIX A	ELEMENTARY PRINCIPALS' AMALGAMATED DECISION FUNCTIONS AND TIMING
APPENDIX B	ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS
APPENDIX C	SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS
APPENDIX D	SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS

APPENDIX E AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS, INFORMATION REQUIREMENTS, AND TIMING

PART ONE: Secondary Principals' Decisions and Information Requirements

PART TWO: Secondary Principals' Decisions (Standardized) and Timing

Volume III: Technical Appendices - Central Board Level

APPENDIX F LIST OF BOARD FUNCTIONS

APPENDIX G INDIVIDUAL DECISION FUNCTIONS

APPENDIX H AMALGAMATED DECISION FUNCTIONS

PART ONE: Decisions by Classification Scheme
PART TWO: Decisions by Board Functions

APPENDIX I TIMING OF DECISION FUNCTIONS - BY CLASSIFICATION SCHEME

APPENDIX J DECISION FLOWCHARTS

APPENDIX K INFORMATION NEEDS FOR DECISIONS - BY BOARD FUNCTIONS

PREFACE

The author wishes to acknowledge all those who contributed to the outcomes of this study. To the Director of the Dufferin Board of Education, Scott Rollit, she is particularly indebted for his enthusiastic support of the project. In terms of the many hours taken out of an already overburdened schedule to participate in intensive interviews and in terms of the keen insights he contributed about the operations and needs of the board, his contribution has been invaluable. His active participation served to set the guidelines for the direction of the project and to enlist the cooperation of the entire staff of the Board.

The author is grateful to the Board's Superintendents, Murray Young, Stan Robinson and Roy Brand, for the contribution of their time and energy to the many hours of intensive interviews and analysis necessary for the completion of this project. Without their excellent cooperation, this study could not have been possible. Thanks are also extended to Ms. Mavis Wilson, Administrative Assistant at the Dufferin Board of Education during the course of most of this study, who provided the study team with large amounts of necessary information. Her loss to the project was most unfortunate and presented a severe setback to its completion.

At the level of the schools, the author would like to thank all the principals, elementary and secondary, for their contribution to the project. Without exception, they completed a very difficult and time-consuming task admirably.

Due to the time-span of the project, the OISE membership on the project team varied. The author wishes to acknowledge the contribution of all the OISE participants in this study. Particular thanks are extended to Ted Vangel, co-principal investigator of the project through the major part of its duration, for his substantial contribution to the study. His unavoidable loss to the project during its final stage was most regrettable. The author is also indebted to James K. Martin, a graduate student who contributed a great deal to the initial conceptualization and operational procedures of the project, and utilized this experience as the basis for a fine Ph.D. thesis. Thanks are also extended to Bryan Elwood, Derry O'Mahony and Dave Sugerman who contributed to various stages of data acquisition and analysis, particularly during the early stages of the study.

Finally, the author wishes to acknowledge the funding support for the project by the OISE Research and Development Office and by the Dufferin Board of Education. Without their generous support, this project would not have been possible.

INTRODUCTION

An information system is defined as a network of communication channels that acquires, processes, stores, retrieves and redistributes data for the individual and collective decision making process. A Management Information System (MIS) is one that supports managerial decision making by supplying relevant information when required. The basic purposes of MIS are to:

- provide timely information to management
- aid in the allocation of resources
- aid in the selection of alternatives

by supplying relevant, reliable and timely information upon which to base decisions.

OBJECTIVE AND SCOPE OF THE STUDY

It was the objective of this project to analyze the managerial decisions at the central office level of the Dufferin County Board of Education in order to design an integrated information system. Although the scope of the system was limited to central board functions, information to and from "external" bodies were dealt with as interfaces with the central board. These included flows of information between:

- school board administration and trustees
- school board administration and Ministry of Education
- school board administration and individual schools

Although the focus of the study was the central office of the Board, it was expected that studying the information needs of the elementary

and secondary schools would provide a useful basis for standardizing their data bases--especially important at a time of rapid movement of principals at the elementary school level.

Since the Board was expecting to undergo organizational changes within the course of the study (and did, in fact, undergo two such changes subsequent to its inception), it was expected that this study would provide inputs which could be useful in the analysis necessary for organizational change. In addition, it could facilitate the implementation of such change by providing for continuity through a systematic analysis of decision functions which must exist regardless of changes in personnel.

Unfortunately, organizational and staff changes at the board during the course of the study caused considerable delays in its completion. This was due to (1) time required to update the decision functions studied at the outset and (2) unanticipated loss of board staff members who were to provide critical elements of data for the completion of the study. For these reasons, the last step in completing the systems analysis is outlined at the end of the study and is left to the administrative staff at the Board.

APPROACH OF THE STUDY

The design of the Management Information System, as conceived in this project, is based on user needs rather than the traditional computer-oriented approach of MIS. This means that the systems design is based on the information needs of the users rather than on the hardware constraints of the computer. All media for storage,

processing and retrieval, including the manual component are considered relevant to the system. In a small board such as Dufferin, the computer may not even be a relevant component of the system. The result is a total, integrated system which best serves the information requirements of the Board's decision makers.

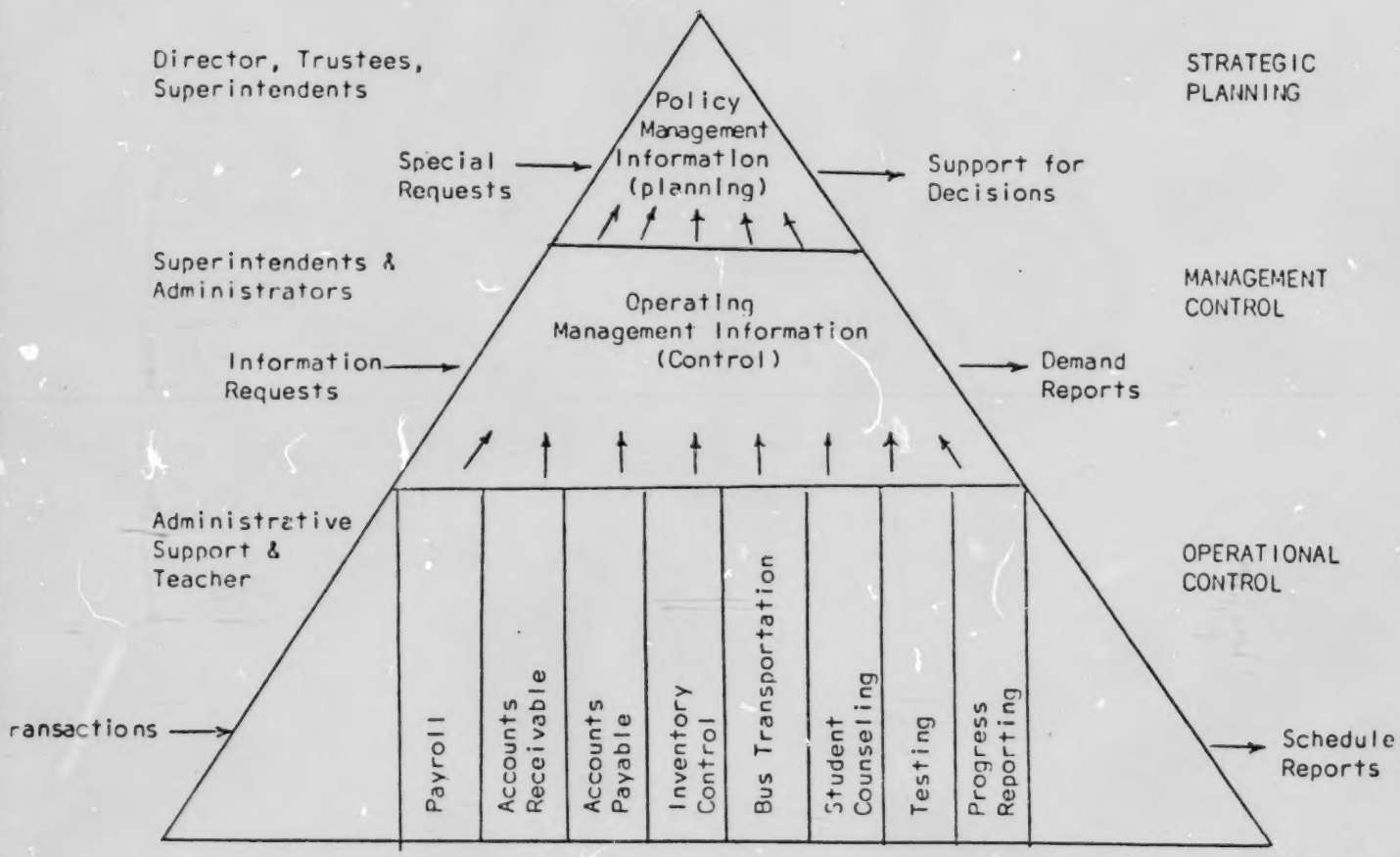
Given the frame of reference of the study, a major component was the identification of the "users" of the MIS and determination of their information needs, as related to their decision functions. Operationally, this included: (a) the definition of the major decision functions of key officials of the board, (b) analysis of the processes in each function, (c) determination of relevant information requirements; and (d) identification of source data and timing required to produce the information.

Given the above analysis, the data base can be designed and maintained in such a way as to satisfy user requirements in the most efficient and effective manner, utilizing any combination of media (including the computer) available to the Board.

Since this approach maintains the importance of information as supportive of the decision-making processes of the Board, the general conceptual framework upon which it is based is one which relates information to levels of decision-making, as in Figure 1. Three levels of management decisions are shown to be supported by the MIS: operational control, management (tactical) control and strategic planning. Operational control relates to the daily routine transactions of the system--purchasing, payroll, inventory control, etc. Management control is concerned with short-range questions of

Figure 1

Management Levels and Information Flow



policy implementation. Strategic planning addresses itself to problems of policy-setting and long-range planning. The MIS design incorporates the information required for these three categories of decisions. The distinction between these types of information is useful because each involves different methods of generation, transformation and presentation. Strictly computer-oriented information systems usually are geared to the production of information for operational and tactical control; they tend to ignore information at the strategic planning level. The orientation of this study is to take all the necessary types of information into account, especially at the levels of tactical control and strategic planning.

To ensure that the user's perspective was maintained throughout, the Director maintained a close involvement with the study. He took an active role in defining the system's objectives, scope and specifications, and provided guidance and monitoring of the general direction of the project. His participation was invaluable both in providing his own keen insights into the operations of the system and in gaining the cooperation and confidence of all the board officials. The OISE study team provided the technical expertise for the analysis and the staff for the detailed interviews with Board officials.

The approach of the study for the OISE study team to conduct intensive interviews with Board officials ("users"), review the outcomes both with the officials interviewed and with the Director of the Board, update and revise these as necessary, and conduct the technical analysis. The key officials and staff at the

Dufferin Board were responsible for providing all the necessary information inputs for the study. These officials and staff members were extremely helpful and cooperative in spending large amounts of time and energy in providing all the information at their disposal to the study. Turnovers in officials, organizational changes and loss of a critical administrative staff member caused unfortunate but unavoidable delays in project completion.

SUMMARY OF OUTCOMES

The outcomes of the study can be summarized as follows:

1. Systems analysis of the Board's operations. For each of the decision functions there is detailed analysis of its components with flowcharts of these activities, and their relationship to other major Board functions.
2. Synthesis of the information structure of the Board. This is presented in terms of an integrated overview of Board decision functions related to levels of decision-making and timing.
3. Need analysis for information system design. Information needs related to the decision functions of the Board are defined in terms of user requirements both at the level of the Board and at the level of the schools.
4. Recommendations for system implementation. Outline of further steps required for operational system design and implementation.

ANALYSIS PROCEDURES AND OUTPUTS

The initialization stage of the project consisted of the determination of the scope and approach of the project and review of general operations of the system.

The boundary of the system under study was defined as the operations of the central board office with detailed study of the interfaces from the elementary and secondary schools. The key decision makers were identified as: the Director of the Board, the three Superintendents, the elementary principals and the secondary principals.

The description of the study is divided in terms of (a) school level analysis, and (b) board level analysis, since each of these outcomes is likely to be relevant to different groups of administrators.

The following is an overview of the steps followed in conducting the study:

A. INITIALIZATION

B. SCHOOL LEVEL

1. Analysis

- identify users
- determine major decision functions

2. Synthesis

- integrate decision functions of principals
- determine information requirements

C. CENTRAL BOARD OFFICE

1. Analysis

- identify users
- determine major decision functions
- analyze processes of decision making

2. Synthesis

- integrate decision functions of board officials
- determine information requirements

A. School Level

The school level of decision making was defined as critical for inputs to the decision functions of the central board office. A somewhat more detailed analysis was carried out at this level than would normally be the case since there was a secondary objective of standardizing data files at the level of the schools. At this level, "user needs" were defined in terms of the decision functions of the school principals. These will be dealt with in terms of elementary and secondary principals. Volume II contains all the appendices related to the school level of the analysis.

Elementary Schools

At the time of the study, there were ten elementary schools in the system. The first step of the analysis was to determine the principals' decision functions. Each principal was asked to complete a form which listed his major decisions, along with frequency, time of year, and general area into which the decision could be classified. Due to the very large set of decisions which a principal must handle daily, the principals found that it would be easier to compile a list of major decisions jointly (since ultimately this was the purpose of the exercise, in any case). Further analysis indicated that this list could be synthesized into six general categories of decision: students, instruction, staff, community relations, plant and transportation.

Table 1 provides a general breakdown of these main decision areas. Appendix A contains the complete amalgamated list of the elementary principals' decision functions and an indication of the timing of these decisions. Tables 2a and 2b are samples from that appendix. Table 2a defines the decisions listed in category 1.1. Their code numbers relate to the specific decisions within a classification. For example, D1,1,1 indicates a decision (D) in the first category, the first sub-category and that it is the first decision on the list. Thus, it relates to the category of student-related decisions, deals with the area of student progress and impediments, and specifically, relates to the adjustment of pupil assignments to classes (D1,1,1). Each category of decisions listed in Table 1 is similarly broken down into specific decisions. These are found in Appendix A.

Next, the sequence and timing of each decision on the amalgamated list was determined. The final section of Appendix A presents this list in its entirety. Table 2b provides a sample from this list for category 1.1. It can be seen that decisions D1,1,1; D1,1,2 and D1,1,3 all occur in September followed by D1,1,4 in May, and D1,1,5 in June. The remaining decisions occur any time between September and June, as the need arises (ANA).

Having compiled an amalgamated list of the major decision functions of elementary school principals and their timing, the next step was to define the information required as inputs to each decision area. These were compiled by the elementary principals in conjunction with the OISE study team. Table 3 provides a sample listing of these information requirements. Appendix B provides the complete list of information requirements for all the decisions listed in Appendix A. This information, along with the

timing of decisions noted in Appendix A, can be used for scheduling the data acquisition and processing to meet required deadlines for decision-making by the principals. Four elementary schools were next selected at random to examine the actual files maintained for each of the categories of information noted in Appendix B. These were: Princess Margaret Public School, Princess Elizabeth Public School, East Garafraxa Central Public School, and Parkinson Centennial Public School. The results of this examination are included in Appendix C.

Secondary Schools

The procedure for analysis of information needs at the secondary school level differed somewhat from the elementary level, for two reasons. Firstly, there were only two secondary schools in the county, so the compilation of a merged decision list was less difficult. Secondly, at this level the objective of developing a uniform filing system did not exist, since turnover of secondary principals was not high. Therefore, the main purpose of this analysis was to provide the information interface with the Board.

Each principal completed a form which provided a list of his major decision functions along with frequency, time of year and the area of the decision. Table 4 is a sample page from such a list. Appendix D contains the individual lists for the two secondary principals. The two principals then developed a combined list of decisions, along with their associated information requirements. This list appears in Appendix E Part One. This merged list was further refined and developed into an amalgamated decision list for secondary principals in the same format as for the elementary principals, along with the timing of each decision. This list is also found in Appendix E.

TABLE 1: CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student Progress/Impediments
1.2 Student Guidance
1.3 Student Relationship to Physical Plant, Equipment

2. INSTRUCTION

2.1 Curriculum
2.2 Instruction Budget

3. STAFF

3.1 Staff: Hire, Terminate, Assess, Allocate
3.2 Staff Professional Development

4. COMMUNITY RELATIONS

4.1 Community Relations - Parents
4.2 Community Relations - Other

5. PLANT

5.1 Relations with Custodian
5.2 Maintenance
5.3 Facility Requirements
5.4 Fire Drill

6. TRANSPORTATION

6.1 Transportation

TABLE 2a: SAMPLE PAGE OF AMALGAMATED DECISION LIST OF ELEMENTARY PRINCIPALS

1.3 Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities

D1,3,2 - Student breakage

D1,3,3 - Use of school equipment by the students

2. INSTRUCTION

2.1. Curriculum

D2,1,1 - Introduction of a new programme

D2,1,2 - Philosophy and implementation, policy type decisions

D2,1,3 - What will electives (if any) be?

D2,1,4 - Assessment of an ongoing programme

D2,1,5 - Decision on old/new programme

D2,1,6 - Adjustment of programmes

D2,1,7 - Adjustment brought about to or because of D2,1,2

D2,1,8 - Areas of school concentration

D2,1,9 - Extra class learning, school activities, athletics, assemblies, etc.

D2,1,10 - Field trips, cost, transportation, etc.

2.2 Instruction Budget

D2,2,1 - Budget, twice yearly material - Textbooks
- library books
- consumables
- spec. ed.

D2,2,2 - Budget, twice yearly material - industrial arts

D2,2,3 - Budget, once yearly material - sports equipment

TABLE 2b: TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student Progress, Impediments

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1	X											
D1,1,2	X											
D1,1,3	X											
D1,1,4									X			
D1,1,5										X		
D1,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,8	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,12	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,13	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,14	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

TABLE 3: Sample Page of Elementary School Principals' Information Requirements

D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES

- registers
- master class lists
- test results
- teacher assessment
- report card
- attendance summary

D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS

- medical report
- psychological report
- special equipment
- transportation
- O.S.R.
- Special Ed. report.

D 1,1,3 ASSESSMENT OF SPEECH--Who require what help

- identification characteristics file
- referral file--Confidential Report
- health record
- O.S.R.
- teacher assessment

D 1,1,3 (b) ASSESSMENT OF HEARING

- health record
- O.S.R.
- public health nurse report
- teaching prescription

D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION

- candidate list
- psychological report
- academic report
- health record
- O.S.R.
- report card
- parent's permission

TABLE 4: INDIVIDUAL SECONDARY PRINCIPAL'S DECISION LIST - SAMPLE

Title: Principal - O.D.S.S.

Assign a No.	Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision 1	What courses to list on the option sheet	once a year	Jan	Curriculu
" 2	What format of option sheet	once a year	Fall	Curriculu
3	What courses to offer when results of option sheets are known	once a year	Feb	Curriculu
" 4	How many sections of each course to offer	once a year	Feb	Curriculu
" 5	What rooms to assign to each course	once a year	Mar	Facilitie
" 6	What teachers should be hired, based on teacher-pupil ratio	once a year	Mar	Recruitme
" 7	How many times to advertise each position	as need arises	March - June	Recruitme
" 8	What ratio of teacher to paraprofessionals to fill teacher-pupil ratio	once a year	Feb	Recruitme
" 9	How many classes should each teacher teach	once a year	Feb	Curriculu
" 10	How many classes should Department Heads teach	once a year	Feb	Curriculu
" 11	How many classes should Program Supervisor teach	once a year	Feb	Curriculu
" 12	How many classes should Vice Principal teach	once a year	Feb	Curriculu
" 13	How many classes should Chairman teach	once a year	Feb	Curriculu
" 14	How many classes should Assistant Department Head teach	once a year	Feb	Curriculu
" 15	How many classes should Principal teach	once a year	Feb	Curriculu
" 16	What classes each Vice Principal is responsible for discipline and attendance	once a year	June	Attendan

B. Central Board Level

At the central board level, the key decision makers were the Director and the three Superintendents. Since this comprised the total set of line officials at this level, the total analysis of decision functions depended upon intensive, time-consuming interviews with these key officials. Volume III of this report presents all the technical documents relevant to the analysis of the central board level decisions.

The first step of the analysis was the determination of the major decision functions of each official. A form describing the major decision functions, frequency, time of year and area of the decision was completed by these officials. During the course of the study, the Dufferin Board produced a newly revised document defining the operations of the Board by function. This document is presented for reference in Appendix F. Using this document, the initial decision list of each official at the board was updated to indicate within which board function each decision fell. Table 5 presents a sample page of such a form for the Director. Appendix G presents the complete set of decision lists for all the key board officials.

On the basis of this set of individual decisions, an amalgamated list of board level decision functions was compiled. This list is presented in Appendix H. Table 6 indicates the general categories of decisions for the central board office administrators, and Table 7 a presents a sample page of the amalgamated set of decisions. These decisions are coded both within the integrated set of board level categories as well as cross-referenced to the original individual decision lists.

TABLE 5: SAMPLE INDIVIDUAL DECISION LIST AT CENTRAL BOARD OFFICE

ITLE: Director of Education and Secretary-Treasurer

lumber	Decision	Frequency	Time of Year	Board Function
R01	Allocation of Director's time:	Continual	All	(1) Organizational Planning
	a) Organization of time to various responsibilities			
	- what can be delegated			
	- to whom			
	b) Priorities on personal time			
R02	Interpretation of	continual	All	(2) Organizational-Executive Level
	- Board policy			
	- needs and wants of personnel; how to handle			
R03	Budget preparation	yearly	Oct-Feb	(3) Administrative Relationships
	- regular needs			
	- special needs and projects			
	- how much total budget can mill rate stand politically	yearly	Oct	
	- how much total budget can ceiling stand	yearly	Oct	
R04	How should budget be distributed among schools	yearly	Feb	(3) Administrative Relationships
R05	Budget control			
	- day school regular	monthly	All	(3) Administrative Relationships
	- conferences, courses during year	monthly	All	
	- What summer courses for teachers should be subsidized by the Board?	yearly	Nov	

TABLE 6: CLASSIFICATION OF CENTRAL OFFICE DECISIONS

1.	INSTRUCTIONAL PROGRAM
1.1	Budget
1.2	Academic Program
2.	STAFFING PROGRAM
2.1	Staff Relations
2.2	Hiring
2.3	Professional Development
2.4	Salary
2.5	Organization
3.	RELATIONS (Board/Community)
3.1	Board
3.2	Community
4.	TRANSPORTATION
4.1	Transportation
5.	PLANT
5.1	Problems Arising
5.2	Accommodation

TABLE 7a: SAMPLE OF AMALGAMATED DECISION LIST AT CENTRAL BOARD LEVEL

2.5 Organization

D2,5,1 - Organizational Changes (R10)

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

D3,1,1 - Determination of Method of Budget Presentation (R03/B11)

D3,1,2 - Agenda Items/Board Reports
(a) Board/Executive (R19.1)
(b) Education Committee (S07)
(c) Accommodation/Maintenance (M01)
(d) Management Committee (R19.2)

D3,1,3 - Monthly Financial Reports to Board (B02, R21)

D3,1,4 - Interpretation of Board Policy - Staff Morale & Welfare Policies (R02,R11)

D3,1,5 - Items Referred to Board or Administration? (R18)

D3,1,6 - Items Referred to Board Solicitor (R16)

3.2 Community

D3,2,1 - Justification of Spending (R13)

D3,2,2 - Answers to Public Re School Areas, Bus Routes, etc. (B01,B06,M06)

D3,2,3 - Information to Federations, Press & Public (R17)

4. TRANSPORTATION

4.1 Transportation

D4,1,1 - Determination of Transportation Arrangements with Bus Operators (Routing, Loading, Payment) (B10)

TABLE 7b: TIMING AND SEQUENCE OF CENTRAL BOARD LEVEL DECISIONS (Sample)

1. INSTRUCTIONAL PROGRAM

1.1 Budget

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1		X				X						
D1,1,2						X						
D1,1,3	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,4	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,5						X						

1.2 Academic Program

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,2						X	X	X	X	X	X	X
D1,2,4									X			
D1,2,5										X		
D1,2,6											X	

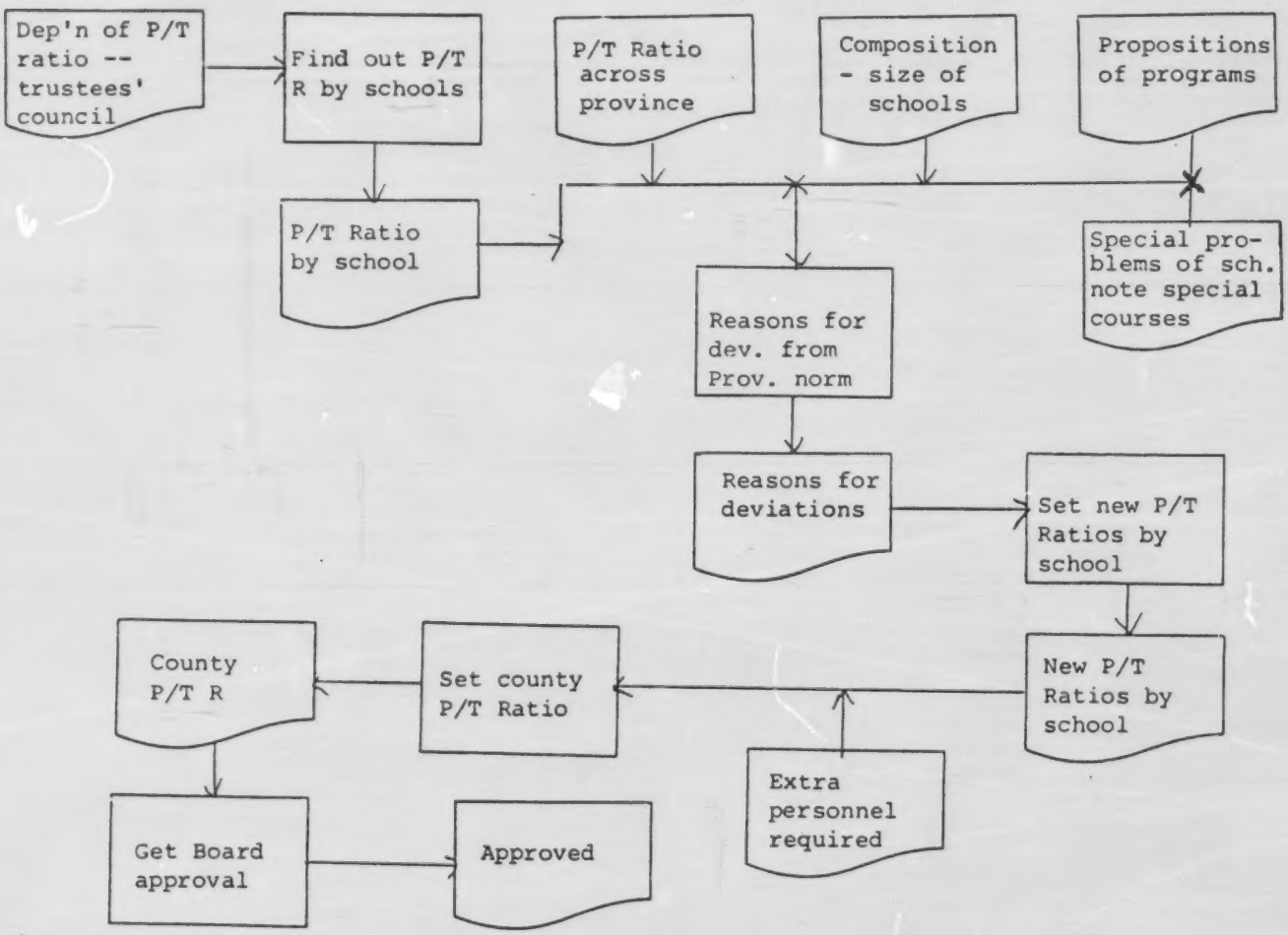
In addition, the board level decisions were also classified according to the board functions specified in Appendix F. This classification scheme is presented in the second half of Appendix H. The reason for this additional classification of decision functions was the production of the document of board level functions after the original categorization scheme was developed. It was felt that such cross-classification would provide additional useful inputs to the board. Following the compilation of the amalgamated list of board decision functions, a synthesized list of the sequence and timing of these decisions was developed. Table 7b provides a sample of this synthesis. Appendix I contains the full list of these decision sequences.

Since the focus of the study was the central board office, a more detailed analysis of the decision functions was conducted than at the school level to determine the relevant information requirements. The approach consisted of detailed interviews with each of the key board officials to produce flowcharts of the processes involved in each of the decision functions on his list. These flowcharts were sufficiently detailed to include the points at which information was utilized in the process as inputs and information which resulted as outputs of the process. This analysis served a multi-fold function: (a) it allowed the board officials the opportunity to analyze their decision-making activities in a manner that they would not normally be able to, (b) it served to indicate the interrelationship between different decision functions of the board, and (c) it provided a more valid and reliable means of determining the actual information relevant to the decision-making process than simply asking for a list of information items used.

FIGURE 2: SAMPLE FLOWCHART OF BOARD LEVEL DECISION FUNCTION

STRIKING COUNTY PUPIL/TLACHER RATIO

i) Secondary


Dep'n of P/T ratio -- trustees' council
Find out P/T R by schools
P/T Ratio across province
Composition - size of schools
Propositions of programs
P/T Ratio by school
Special problems of sch. note special courses
Reasons for dev. from Prov. norm
Reasons for deviations
Set new P/T Ratios by school
County P/T R
Set county P/T Ratio
New P/T Ratios by school
Extra personnel required
Get Board approval
Approved

ii) Elementary

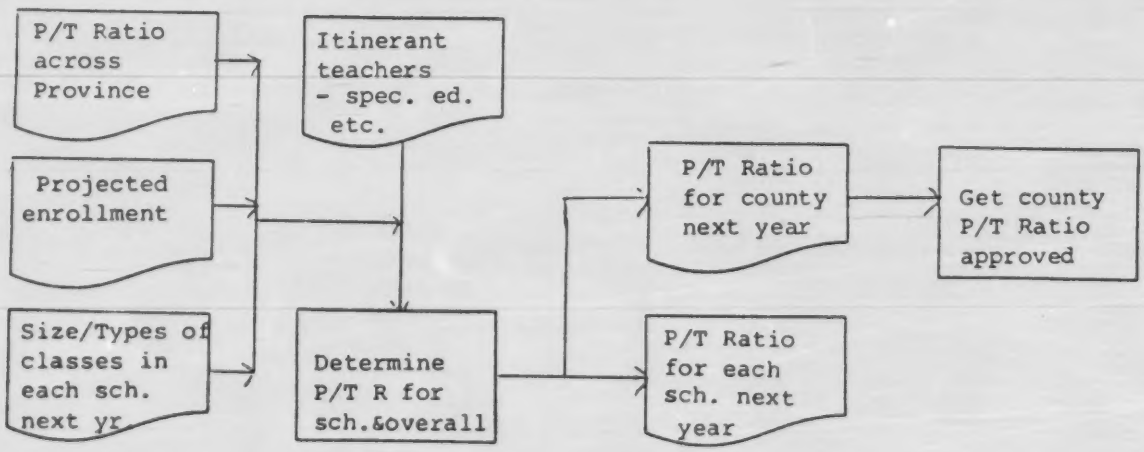

P/T Ratio across Province
Itinerant teachers - spec. ed. etc.
Projected enrollment
P/T Ratio for county next year
Get county P/T Ratio approved
Size/Types of classes in each sch. next yr.
Determine P/T R for sch.&overall
P/T Ratio for each sch. next year

Figure 2 is a sample flowchart of the variety described. Appendix J contains the total set of flowcharts for the central office decision functions. Where several decision areas utilized the same sub-set of decisions, these were flowcharted separately and called "Information Transformation Modules". These represent areas of information-generating activities common to more than one decision function. Table 8 is a list of all the Information Transformation Modules in the central board decision functions. These too are found in Appendix J.

From these flowcharts, a list of required information items was compiled for each decision. Table 9 is an example of such a listing. Appendix K contains the total set of information needs by decision functions at the Board level.

TABLE 8: INFORMATION TRANSFORMATION MODULES

ITM1	Enrollment Projections (Twice Yearly)
ITM2	Revenue Projections (Twice Yearly)
ITM3	Maintenance Cost Projections
ITM4	Debt Charge Projections Estimated Revenue for Salaries
ITM5	Busing Costs Projection
ITM7	Facilities Projection
ITM8	Amount Available for Schools (Jan.-Feb.)
ITM9	Assessment of Present Program
ITM10	Review of Present Curriculum in Print
ITM11	New Curriculum Needs
ITM12	M.E. Guidelines
ITM13	Priority of Needs
ITM14	Determine Money Available for Elementary School Staffing
ITM15	Data by Criteria (Evaluation of Elementary Principals)

TABLE 9: SAMPLE LIST OF INFORMATION REQUIRED FOR BOARD LEVEL DECISIONS

(3) ADMINISTRATIVE RELATIONSHIPS

R03 Budget Preparation

Documents

Accumulation file on desired budget expense

Basic form from central office

Desired items with priority attached

Principal's opinion

Superintendent's prior assessment of needs

Estimated amount for main budget

Supervisor of plant - estimate of prices

Budget for main (implied)

Proposed main budget

Consumable/Cap. Alloc.

Principal's consumable and capital allocation requests

Goals of county system progress

Average per pupil allotments across province

P/T ratios by school

Econ. milieu inflation

Per pupil allotments

Needs of spec. ed. music etc.

Total reg.

ME grant regulation

Assessment (by area)

Mill rate

Proposed budget

RESULTS OF THE STUDY

The outputs presented in Volumes II and III of this report present the major results of the study relevant to information analysis at the Dufferin Board of Education, at the levels of the schools and the central board office, respectively. These results constitute a systems analysis of activities of the board. These can be used for analyzing board functions and determining areas where more rational and efficient procedures can be developed. These outputs can also be useful in undertaking future organizational changes at the board level.

In addition, it provides the board with an integrated, comprehensive list of functions and specific areas of decision-making that can be applicable in periods of rapid turnover of staff or for use in description of duties after organizational changes have occurred. The set of board level and school level decisions, as presented, represent functions necessary to the operations of the board, and therefore, can be viewed as independent of specific personnel or organizational structure. As activities of the board are altered, these documents can be updated as required to provide a continuing, up-to-date analysis of the board's major functions.

The major output of the study, with respect to the objectives originally defined, is the identification of the flows of information at the level of board office decisions and the definition of related information needs. Information needs at the school level of decision making can be viewed from the perspective of inputs to the board's decision-making processes or from the internal requirements of the schools.

RECOMMENDATIONS FOR IMPLEMENTATION

To further develop the information system design and implementation the Board can complete the following steps:

1. Specific sources of information in terms of the board's files can be noted on the documents in Appendix K which list information needs by decision. By including the specific timing of decisions on these lists (from Appendix I), the schedule of information-generating procedures can be established. The following format can be followed:

   Decision Function: _____

Information Needs	Sources	Timing

   This format would establish a schedule linking decision-making requirements with data extraction and processing as prerequisite inputs to the decision functions.

2. Analysis of the decision flowchart (Appendix J) and the information needs documents (Appendix I) along with the results of step 1 above, will provide the board with an indication of areas of information gaps and inadequacies as well as areas of information overload and redundancy.

3. Data files can be designed by identifying clusters of information needs as they relate to board functions or categories of board decision areas. This can be done by developing a matrix classification of decision areas vs. associated information categories.

"Information categories" are those which can then relate to data files. The latter can be obtained from Appendix K and documentation of source files noted in Step 1 above. The following format can be used as a guide:

INFORMATION CATEGORIES

DECISION AREAS	Personnel Adm Admin.	Staff Development	Staff Evaluation	Finance	Purchasing & Supplies	Plant & Facilities	Student Services (Special)	Instructional Program	Student Information	etc.
1. Instruction										
1.1 Budget										
1.2 Academic Program										
etc. (See Table 6 for entire list of areas)										

4. Procedures for maintaining and updating the data files can be established to correspond to timing requirements of the decision functions as well as to changes in them. Data control is then concerned with the tasks of data gathering, preparation, retrieval, transformation and maintenance. The end product would be a set of procedures that outlines the control and maintenance functions of the information system by scheduling, initiating and monitoring its operations.

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume II: Technical Appendices - School Level

Susan Padro

March, 1977

Ed 013 168
Vol. II

Department of Educational Planning

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

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TABLE OF CONTENTS

Volume II: Technical Appendices - School Level

APPENDIX A ELEMENTARY PRINCIPALS' AMALGAMATED DECISION FUNCTIONS AND TIMING

APPENDIX B ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS

APPENDIX C SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS

APPENDIX D SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS

APPENDIX E AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS, INFORMATION REQUIREMENTS, AND TIMING

PART ONE: SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS

PART TWO: SECONDARY PRINCIPALS' DECISIONS (STANDARDIZED) AND TIMING

APPENDIX A

ELEMENTARY PRINCIPALS' AMALGAMATED DECISION FUNCTIONS AND TIMING

CLASSIFICATION OF ELEMENTARY PRINCIPALS' DECISIONS

A. MAIN CATEGORIES

1. STUDENTS

1.1 Student Progress/Impediments
1.2 Student Guidance
1.3 Student Relationship to Physical Plant, Equipment

2. INSTRUCTION

2.1 Curriculum
2.2 Instruction Budget

3. STAFF

3.1 Staff: Hire, Terminate, Assess, Allocate
3.2 Staff Professional Development

4. COMMUNITY RELATIONS

4.1 Community Relations - Parents
4.2 Community Relations - Other

5. PLANT

5.1 Relations with Custodian
5.2 Maintenance
5.3 Facility Requirements
5.4 Fire Drill

6. TRANSPORTATION

6.1 Transportation

B. SUB-CATEGORIES

1. STUDENTS

1.1 Student Progress/Impediments

D1,1,1 - Adjustments of pupil assignments to classes

D1,1,2 - Students with physical handicaps, what special must be done

D1,1,3 - (a) Assessment of speech, who requires what help
(b) Assessment of hearing, who requires what help
(c) Assessment of vision, who requires what help

D1,1,4 - Who into Special Education or pre-occupations

D1,1,5 - (a) Promotion of students
(b) Placement of students into classes

D1,1,6 - (a) Accident and/or sickness of students - as an emergency
(b) Accident and/or sickness of students - results from

D1,1,7 - Communicable diseases

D1,1,8 - Student welfare - do they come poorly clothed, unclean, inadequate lunches, etc.

D1,1,9 - Discipline of misbehaving students

D1,1,10 - Attendance problems

D1,1,11 - Student progress problems

D1,1,12 - Individual level adjustment

D1,1,13 - Remedial instruction useful

D1,1,14 - Enrichment useful

D1,1,15 - Special service assessment useful

D1,1,16 - Psychological problems of the students

1.2 Student Guidance

D1,2,1 - Guidance decisions for grade 8 students re grade 9 options

1.3 Student Relationship to Physical Plant/Equipment

D1,3,1 - Policy on student care of facilities

D1,3,2 - Student breakage

D1,3,3 - Use of school equipment by the students

2. INSTRUCTION

2.1 Curriculum

D2,1,1 - Introduction of a new programme

D2,1,2 - Philosophy and implementation, policy type decisions

D2,1,3 - What will electives (if any) be?

D2,1,4 - Assessment of an ongoing programme

D2,1,5 - Decision on old/new programme

D2,1,6 - Adjustment of programmes

D2,1,7 - Adjustment brought about to or because of D2,1,2

D2,1,8 - Areas of school concentration

D2,1,9 - Extra class learning, school activities, athletics, assemblies, etc.

D2,1,10 - Field trips, cost, transportation, etc.

2.2 Instruction Budget

D2,2,1 - Budget, twice yearly material
- Textbooks
- library books
- consumables
- spec. ed.

D2,2,2 - Budget, twice yearly material - industrial arts

D2,2,3 - Budget, once yearly material - sports equipment

D2,2,4 - Budget, once yearly material
- audio-visual
- capital equipment
- oral French
- music
- remedial & enrichment
- science supplies/equipment
- art
- novels

D2,2,5 - Budget, weekly material
- home economics

3. STAFF

3.1 Staff: Hire, Terminate, Assess, Allocate

D3,1,1 - Assessment of probationary teachers

D3,1,2 - Teacher requirements

D3,1,3 - Hiring

D3,1,4 - Assessment of permanent teachers

D3,1,5 - Placement of teachers

D3,1,6 - Supply teachers

D3,1,7 - Dismissal of teachers

3.2 Staff Professional Development

D3,2,1 - Teacher request to visit

D3,2,2 - Consultants

D3,2,3 - In-service training

4. COMMUNITY RELATIONS

4.1 Community Relations - Parents

D4,1,1 - Decisions on open houses, parent nights, interviews, comments of parents, once a term

D4,1,2 - Parental complaints, how to handle

4.2 Community Relations - Other

D4,2,1 - Facility rental

D4,2,2 - Other problems in school-community relations (e.g., charity work)

5. PLANT

5.1 Relations with Custodian

D5,1,1 - Supervision of custodial staff

D5,1,2 - Custodial/staff relations

5.2 Maintenance

D5,2,1 - Cases of vandalism

D5,2,2 - Maintenance, repairs required (by who)

5.3 Facility Requirements

D5,3,1 - Additional classrooms

D5,3,2 - Storage needs

5.4 Fire Drill

D5,4,1 - Fire drill, when, etc.

6. TRANSPORTATION

6.1 Transportation

D6,1,1 - Transportation, policy normal

D6,1,2 - Transportation, winter storm procedure, decide upon

D6,1,3 - Transportation, bus breakdown

D6,1,4 - Transportation, early dismissal (non-storm)

D6,1,5 - Transportation, pupils change bus

D6,1,6 - Transportation, implementation of D6,1,2, include billeting of students whenever necessary

C. TIMING OF ELEMENTARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student Progress, Impediments

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1	X											
D1,1,2	X											
D1,1,3	X											
D1,1,4									X			
D1,1,5										X		
D1,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,8	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,12	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,13	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,14	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

1.2 Student, Guidance

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,1							X					

1.3 Student, Relationship to Physical Plan/Equipment

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,3,1	X											
D1,3,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D1,3,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2. INSTRUCTION

2.1 Instruction, Curriculum

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X											
D2,1,2	X											
D2,1,3	X				X			X				
D2,1,4				X					X			
D2,1,5								X				
D2,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,8	X									X		
D2,1,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2.2 Instruction, Budget

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1		X							X			
D2,2,2		X						X				
D2,2,3								X				
D2,2,4									X			
*D2,2,5	X	X	X	X	X	X	X	X	X	X		

*Weekly

3. STAFF

3.1 Staff, Hire, Terminate, Assess, Allocate

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1			X				X		X			
D3,1,2								X				
D3,1,3								X				
D3,1,4								X	X			
D3,1,5									X	X		
D3,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,1,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.2 Staff Professional Development

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,2,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

4. COMMUNITY RELATIONS

4.1 Community Relations - Parents

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1	X				X			X				
D4,1,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

4.2 Community Relations - Other

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D4,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5. PLANT

5.1 Relations with Custodian

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1	X	X										
D5,1,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5.2 Maintenance

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D5,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5.3 Facility Requirements

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,3,1								X				
D5,3,2									X			

5.4 Fire Drill

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,4,1	X	X	X	X	X	X	X	X	X	X		

6. TRANSPORTATION

6.1 Transportation

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D6,1,1	X											
D6,1,2	X											
D6,1,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D6,1,6				ANA	ANA	ANA	ANA					

APPENDIX B

ELEMENTARY PRINCIPALS' INFORMATION REQUIREMENTS

D 1,1,1 ADJUSTMENT OF PUPILS TO CLASSES

- registers
- master class lists
- test results
- teacher assessment
- report card
- attendance summary

D 1,1,2 STUDENT WITH PHYSICAL HANDICAPS

- medical report
- psychological report
- special equipment
- transportation
- O.S.R.
- special Ed. report.

D 1,1,3 ASSESSMENT OF SPEECH--Who require what help

- identification characteristics file
- referral file--Confidential Report
- health record
- O.S.R.
- teacher assessment

D 1,1,3 (b) ASSESSMENT OF HEARING

- health record
- O.S.R.
- public health nurse report
- teaching prescription

D 1,1,4 WHO ENTER SPECIAL EDUCATION OR PRE OCCUPATION

- candidate list
- psychological report
- academic report
- health record
- O.S.R.
- report card
- parent's permission

D 1,1,3 (c) ASSESSMENT OF VISION

- health record
- O.S.R.
- public health nurse report
- teaching prescriptions
- teacher assessment

D 1,1,5 (a) PROMOTION OF STUDENTS

- report card (student file)
- O.S.R.
- objective and teacher tests
- recommendations--teacher

D 1,1,5 (b) PLACEMENT OF STUDENTS INTO CLASS

- standardized tests
- objective and teacher assessment
- social relationship inventory
- class list
- June promotion data

D 1,1,6 (a) ACCIDENT AND/OR SICKNESS OF STUDENTS

- telephone number of parent and/or employer
- telephone number of alternate family
- telephone number of ambulance and hospital
  choice of hospital--doctor
- list of students with special medical problems
- accident report
- insurance--list

D 1,1,6 (b) ACCIDENT AND/OR SICKENSS OF STUDENTS

- telephone number (a) parent and/or employer
  (b) alternate
- insurance--list
- medical report
- parental information

D 1,1,7 COMMUNICABLE DISEASES

- health unit data--handling the disease
- previous precaution
- medical consultation

D 1,1,8 STUDENT WELFARE

- family background--nurse
- O.S.R.
- children Aid-- if involved
- teacher notification

D 1,1,9 DISCIPLINE OF MISBEHAVING STUDENTS

- O.S.R.
- teacher assessment
- behavioural file
- confidental report
- psychological report

D 1,1,10 ATTENDANCE PROBLEMS

- Board Policy
- register
- teacher report
- attendance officer telephone number
- attendance officer report

D 1,1,11 STUDENT PROGRESS PROBLEMS

- O.S.R.
- report card
- standardized test
- nurse report

D 1,1,12 INDIVIDUAL LEVEL ADJUSTMENT

- See D 1,1,1

D 1,1,13 REMEDIAL INSTRUCTION USEFUL

- O.S.R.
- report card
- standardized test
- special education recommendation
- remedial class list and waiting list

D 1,1,14 ENRICHMENT USEFUL

- O.S.R.
- standardized test
- special education recommendation
- teacher assessment and recommndation

D 1,1,15 SPECIAL SERVICE ASSESSMENT USEFUL

- teacher's assessment and report
- referrals
- O.S.R.
- report card
- health record

D 1,1,16 PSYCHOLOGICAL PROBLEMS OF THE STUDENT

- teacher assessment
- psychological reports
- O.S.R.
- medical and/or health record
- children's Aid if involved
- Community Psychiatric Hospital-Guelph

D 1,2,1 GUIDANCE DECISIONS FOR GR. 8 STUDENTS

- data from Secondary Schools
- (Calendar)
- progress reports
- O.S.R.

D 1,3,1 POLICY ON STUDENT CARE OF FACILITIES

- Board policy
- school policy

D 1,3,2 STUDENT BREAKAGE

- Board policy
- school policy
- maintenance requisition form

D 1,3,3, USE OF SCHOOL EQUIPMENT BY THE STUDENTS

- Board Policy

D 2,1,1 INTRODUCTION OF A NEW PROGRAMME

- Cost factor
- general ability level of children and their needs
- resources available and required
- social implications
- community implications

D 2,1,2 PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DIVISIONS

- needs of the school and community
- factors affecting the change
- resource needed for change
- physical requirements of the school to adapt to such a change
- community co-operation

D 2,1,3 WHAT WILL ELECTIVES (IF ANY) BE?

- interest of teachers
- interest of pupils
- facilities
- parent involvement (community)
- time--during day
- economic requirements

D 2,1,4 ASSESSMENT OF ONGOING PROGRAMME

- efforts (a) written
  (b) oral
- objectives
- resources
- suited to individual
- creativity
- interest
- use of time
- involvement
- skills acquired

D 2,1,5 DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR

- use of D 2,1,4, Information sheet
- new situations which have developed

D 2,1,6 ADJUSTMENT OF PROGRAMME

- cost
- adaptation to physical plant
- assessment of present programme

(2,1,4) + (D 2,1,5)

D 2,1,7 ADJUSTMENT BROUGHT ABOUT TO OR BECAUSE OF D 2,1,2

- nothing extra

D 2,1,8 AREAS OF SCHOOL CONCENTRATION

- grade concentrations--numbers
- academic needs of students
- qualifications of teachers
- physical capabilities of the school plant

D 2,1,9 EXTRA CLASS LEARNING--ATHLETIC ASSEMBLIES
SCHOOL ACTIVITIES

- plant capabilities
- timetable available time in learning areas
- number of classes
- age and/or grade levels
- staff needs

D 2,1,10 FIELD TRIPS, COST, TRANSPORTATION ETC.

- objectives of trip
- length of trip
- learning activities--before
after
- cost of bus
- cost of activity
- fund raising activities
- parent involvement

D 2,2,1 BUDGET, TWICE YEARLY MATERIAL--texts
library
consummables
spec.ed.

- number of pupils--regular class
special ed.
- special needs of teachers for special programme
- existing supplies
- projection of needs

D 2,2,2 BUDGET TWICE YEARLY MATERIALS/INDUSTRIAL ARTS

- number of boys
- programme objectives as set out by teacher
- material needed for projects
- equipment available
- suppliers--cost

D 2,2,3 BUDGET ONCE YEARLY MATERIAL--SPORTS EQUIPMENT

- equipment inventory
- needs as related to proposed programme
- projected cost factor

D 2,2,4 BUDGET ONCE YEARLY MATERIAL

- inventory of present equipment
- objectives of the programme
- number of students to take part
- replacement or new

D 2,2,5 BUDGET, WEEKLY MATERIAL-HOME ECONOMICS

- long range plans
- short term plans
- number of students involved
- suppliers--cost

D 3,1,1 ASSESSMENT OF PROBATIONARY TEACHERS

- test marks of students (compared to previous)
- test marks of students (compared to other students of same level)
- attitudes (measurable) of students
- curriculum development involvement
- professional development involvement

D 3,1,2 TEACHERS REQUIREMENTS (NO. OF)

- no. of students
- pupil/teacher ratio for county
- county policy re para-professionals
- general intellectual level of students of school area
- no. of special education classes in school
- type of programme to be operated
- type of school facilities e.g. open space

D 3,1,3 TEACHER HIRING

- educational background of applicants (degree, special courses etc.)
- teachers' college or former school rating
- advertise (type of)
- type of information sheets to be completed by applicants
- interviewing procedure--where, when, who involved, how
- specific needs of each school
- ratio of experienced to inexperienced
- male or female
- age of applicant

D 3,1,4 (SAME AS D 3,1,1)

D 3,1,5 PLACEMENT OF TEACHERS

- teacher's desire and interest
- programme requirements
- education and qualifications of teacher
- experience of teacher
- type of students
- type of facility
- type of programme with which she/he has had experience

D 3,1,6 SUPPLY TEACHERS

- experience
- qualifications
- type of programme worked in
- level preference
- previous performance

D 3,1,7 DISMISSAL OF TEACHERS

- Negative reprots using D 3,1,1 or D 3,1,4 as assessment criteria
- Visits of superintendent to teacher in question will occur a number of times

  He will make written reports, seen and signed by teacher
- Numerous principal written reports will be in existence (dated and signed by teacher in question).

D 3,2,1

- reason for request
- can her class be covered (other teacher's timetable).
- how can her class be covered
- can arrangements with place to be visited be made?
- no. of previous visits

D 3,2,2 CONSULTANTS

- does principal or staff decide whether consultation
- which consultant
- for how long--when?
- type of workshop, lecture, etc.
- with other schools, single staff, division, or individual
- no of visitations
- exact follow procedures

D 3,2,3 IN SERVICE TRAINING

- measure student progress
- measure student attitudes and interests
- measure student behaviour
- who will receive (whole staff, individual)
- in which areas e.g. subject, class management, etc.
- who will provide training
- format of training
- no sessions

D 4,1,1 DECISION ON OPEN HOUSE
(Parents Night, Interview, etc.)

- staff wishes
- parental wishes
- administration wishes
- children's wishes

D 4, 1,2 PARENTAL COMPLAINTS, HOW TO HANDLE

- nature of the complaint
- whether to call the person complaining on the phone or have them come in
- the number of complaints
- if the complaint involved pupils, where they were at the time of the problem

D 4,2,1 FACILITY RENTAL

- what groups should pay for the facility and what groups shoult not
- how groups make application for use of facility
- procedure to follow in case of damage to facility
- rules to follow while facility is being used (e.g. use of type of footwear, school equipment, etc.)
- storage of group's equipment
- responsibility of Board in case of accident or personal injury
- who is responsible for facility while group is using it
- when the facility is available

D 4,2,2 OTHER PROBLEMS IN SCHOOL--COMMUNITY RELATIONS

- the nature of the problems with these projects
- who should represent the school in the project
- how to stimulate interest in school--community activities
- how and who deals with the complaints
- what the interest of the community is in community--school activities

D 5,1,1 SUPERVISION OF CUSTODIAL STAFF

- work habits, notes on (i.e.--lazy)
- recommendations

D 5,1,2 CUSTODIAL/STAFF RELATIONS

D 5,2,1 CASES OF VANDALISM
- Board policy

D 5,2,2 MAINTENANCE, REPAIRS (by who)
- due to vandalism
- who to call for glass, hydro, etc.

D 5,3,1 ADDITIONAL CLASSROOMS

- survey of subdivision
- projected enrolment
- teacher-pupil needs

D 5,3,2 STORAGE NEEDS

- presently permanent
- additions:
  1) what is there now?
  2) caretaker needs
  3) teacher/pupil supply needs
  4) order procedure (supplies)
     -once, or twice
  5) type of storage--central or dispersed

D 5,4,1 FIRE DRILL--when, etc.

- school routines

APPENDIX C

SAMPLE DATA FILES FOR ELEMENTARY PRINCIPALS' DECISIONS

ELEMENTARY SCHOOL: FILED DATA CATEGORIZED BY
DECISION INFORMATION REQUIREMENTS

PM = Princess Margaret Public School

PE = Princess Elizabeth Public School

EG = East Garafraxa Central Public School

PC = Parkinson Centennial Public School

$D_{1,1,1}$ ADJUSTMENT OF PUPILS TO CLASSES

-REGISTERS:- Class Registration Book usually kept by class teacher during term.

-MASTER CLASS LISTS:-

PM "Class Lists" Sept. 72, Organization" - (list of students by room No.)

PM "Teachers class lists 1972-73". - (unstandardized class lists from teacher to secretary gives name, address, tel., religion, parents' occupation.)

PE list of class allocations - "Kindergarten (72-73).

EG "classroom lists (72)"

-TEST RESULTS:

PC "Marks-Report Cards;" at end of each term each teacher provides principal with class marks, then back in file until next term.

PM "Term Report Cards and Mark Sheets (for 2 Years)." (one term per folder, 3 terms per year, copies of Individual Student Progress Report filed by class.

PM "Standardized Tests":- (lists of student scores on various standardized tests - usually reading, Gates McGuity etc.)

PE "Continuous Progress-Reading:- "(checklists of Kindergarten progress & achievement in level system. - skills tests now recorded by group achievement and transferred to individual record when student leaves or transfers.) See OSR folders.

PE "Testing":- (correspondence, notes and forms re standardized tests and scoring service).

EG "Special Test Results" (Binder File):- Gates McGuity etc. standardized tests for selected grades.

EG "C.T.B.S." (=Canadian Test of Basic Skills):- memo from Board Office on schedule of tests 1972.

-TEACHER ASSESSMENT:- (mainly found on "Student Achievement Form") in OSR folder - PC.

PM See above.

PE "Student Achievement Records": - (Binder File) ?

PE "Class Profiles": -(Teachers report to principal about 1st Jan Re class problems of a group or individual nature.)

EG "Promotion Reports" - teachers report on order of merit marks & recommendations re promotions, failures.

-REPORT CARD- PC (see above)
PM (see above)

-ATTENDANCE SUMMARY:- PC "Forms - Attendance Reports": - monthly to Board office - secretary keeps current reports & compiles new ones using "attendance record book. PC.

PM "Monthly Attendance":- (Binder File) current admissions, transfers, retirements by classrooms:- running tally of students.

PM "Monthly Report":- Copies of Monthly Attendance Reports contains teacher as for PC above.

PE : contains teacher abscences, supply teachers used &
EG student inventory.

$D_{1,1,2}$ STUDENTS WITH PHYSICAL HANDICAPS

- MEDICAL REPORT
-PSYCHOLOGICAL REPORT
-SPECIAL EQUIPMENT
-TRANSPORTATION
-OSR
-SPECIAL Ed. REPORT

Presumably kept by the nurse or therapists concerned.

- grouped by classroom.

-MINOR ALLERGIES - PC "Nurse Health":- parents notification of childs' allergies.

PC.PE.EG. "Emergency File": - School list by class of childrens' handicaps, allergies, etc., with notes.

$D_{1,1,3}$ ASSESSMENT OF SPEECH

-IDENTIFICATION CHARACTERISTICS FILE

PC "Special Education, Memos, lists":- includes correspondence with Special Ed. Consultant re characteristics of pupils with possible problems.

EG "Learning Disabilities - Diagnosis & Remediation":-
- Note on Do's & Don'ts for teachers of stutterers.
- diagnosis guides for learning disabilities in general.

-REFERRAL FILE---CONFIDENTIAL REPORT:

PC Principals' personal binder files "Confidential Special Ed., students 'test results etc."

maintained by visiting specialists. PE, PM, EG. "Special Services Log." - current student lists for students undergoing therapy, under investigation, review, dismissals, referals.

PM "Remedial Reports (1971-72)":- Reports by teacher on Children in remedial class - anecdotal.

PE Principals anecdotal File - Pupils.

-HEALTH RECORD:- In nurses files.

-OSR:- O.K.

-TEACHER ASSESSMENT:-

PC "Special Education, memos, lists," - contains lists of students
EG with learning difficulties, receiving therapy, under review, with their disfunction.

PE "Remedial Speech." Copy of 1971 remedial speech survey form sent to Speech Therapist at Board Office, gives list of children with great difficulty who may require help.

PM "Student Therapist Activities": - list of students to receive remedial therapy + record of teachers' meetings with therapist.

$D_{1,1,3}$ ASSESSMENT OF HEARING:

-HEALTH RECORD:- Nurses Files.
-O.S.R.:- O.K.
-PUBLIC HEALTH NURSE REPORT:- Nurses Files?
-TEACHING PRESCRIPTION:- Special Services Log (see PM above)

PM "Student Therapist Activities:"- suggested procedures for therapists.

$D_{1,1,4}$ WHO ENTER SPECIAL ED^{N} OR PRE-OCCUPATION: (This is not primarily the Principals' Decision)

-CANDIDATE LIST:- PC "Special Education, memos, lists":-
- survey of pupils with learning difficulties,
- class rolls for Special Ed.
- list of students under review for Sp. Ed. and their dysfunction.

PM Special Education":- list of applicants being considered for Pre-Occ. programs (standard board form)
"-Pre-occ. Nominations"

PM, EG, PE. "Special Services Log":- Special & Remedial class Lists.

-PSYCHOLOGICAL REPORT:-

PM, EG. Nearest is "Confidential Report" on special children sent by Principal to Board consultants on Psychiatric Hospital.

-ACADEMIC REPORT:-

PC "Principals' Personal Desk Binder Files",
- Confidential Special Ed. Students test results.

PM "Term Report Cards & Mark Sheets":- for last 2 years shows individual student progress.

PE Binder File "Student Achievement Records".

EG "Special Test Results" - standardized tests & individual reports.

-HEALTH RECORD - Nurses Files.
-O.S.R. - O.K.
-REPORT CARD - PC. PM. Term marks - copies of teachers' reports to parents (bound forms).

-PARENTS PERMISSION - PM. Application forms sent by Parents for entry into pre-occ. or occ. program.

-REMEDIAL REPORTS - PM. Reports on individual students in Remdial class from teacher of that class.

$D_{1,1,3}$ (c) ASSESSMENT OF VISION

-HEALTH RECORD - Nurses Files.
-O.S.R. - - O.K.
-PUBLIC HEALTH NURSE REPORT - Nurses Files.
-TEACHING PRESCRIPTIONS - (Parkinson has its own special form which each teacher
-TEACHING ASSESSMENT - fills out at end of Sept. - gives lists of "Hearing, Vision and Speech problem pupils. Have not found completed records, Presume Nurse keeps them.)

$D_{1,1,5}$ (a) PROMOTION OF STUDENTS (Not too applicable in continuous Progress Environment except for Gr. 8).

-REPORT CARD (STUDENT FILE) - PC. PM. see above
-OSR - - O.K. Contains student Progress Reports updated 3 times/yr.
-OBJECTIVE AND TEACHER TESTS:- PC on OSR folder. (space for standardized tests)

PC. PM. Term Reports & Mark Sheets.
PM. "Standardized Tests":- lists of students scores on various standardized tests - usu. reading.

PE "Student Achievement Records" binder.

EG "Special Test Results" - Gates-McGuity etc. standardized tests for selected grades.

-RECOMMENDATIONS-TEACHER

EG "Promotion Reports 1972".- Teachers reports on order of merit, marks and recommendations - esp. for Gr. 8. Special reports on failures.

- SKILLS BOOKLETS (where developed, e.g., Primary & Junior Math)

PE "continuous Progress-Reading:"- checklists of Kindergarten Progress & achievement related to level system. Skills Booklet for each child used to record levels attained - recorded & transferred to individual record when leave or transfer.

-AWARDS:- PE.EG: "Graduation - Awards & Assembly":- list of pupils receiving or eligible for various awards.

-PROMOTION LISTS - GR. 8 - PC.EG - made up in June after consultations, guidance, etc. - copy to High School - summary of allocations to Superintendent.

"BOARD POLICY RE CONTINUOUS PROGRESS":- memos from central office explaining policy.

"CLASS LISTS" - see above.

$D_{1,1,5\ (b)}$ PLACEMENT OF STUDENTS CLASS

-STANDARDIZED TESTS - PM.PE.EG. as in objective & teacher tests (above)

-OBJECTIVE AND TEACHER ASSESSMENT -
PM. PC. "Marks - Report Cards; - term marks.
O.S.R. cards have student achievement & Progress Reports.

PE "Student Achievement Records" binder.

PE Skills test booklets.

-SOCIAL RELATIONSHIP INVENTORY - Nothing

-CLASS LIST - PC.PM.P.M.PE.EG. Student names by class.

-JUNE PROMOTION DATA - PC. "Grade 8 - Promotion lists"
PM. "Promotion Sheets":- Gr. 8 Promotion to ODSS
Also names & comments on special learning difficulty pupils.
EG. "Promotion Reports 1972" - (see above) -
- also shown on OSR folder.

-CURRENT REGISTRATION DATA (Particularly Kindergarten)

PM "Monthly Attendance" Binder - contains admissions, transfers, retirements by classroom.

EG.PE. "Kindergarten (72-73):- registration slips, list of class allocations.
-Pre-school survey

-ELECTIVES - PM.PE. Lists of students with given elective and room taken in.

-TEACHERS TIMETABLES -

PM.PE.EG.EG. Teachers timetables and schedules of supervision duties.

$D_{1,1,6}$(a) ACCIDENT AND/OR SICKNESS OF STUDENTS. (EMERGENCY).

-TELEPHONE NO. OF PARENT AND/OR EMPLOYER -

(This information is everywhere (in Ontario) available on the OSOR cards and is initially obtained from student registration forms. In addition some school secretaries have a quick look-up ROLEDEX file (alphabetic stud. name), with STUDENT NAME, ADDRESS, HOME TEL. NO., GRADE ETC.)

PC.PM.EG

PM. "Teachers class lists (1972-73)" - from teacher to secretary giving class lists with name, address, phone, emergency tel., Parents occup'n, Religion. - could be used to update OSOR cards & ROLEDEX file.

-TELEPHONE NO. OF ALTERNATE FAMILY -

PE. Questionnaire to Parents for updating records asks for phone no. of close friend & own doctor. - We haven't found records referred to.

-TELEPHONE NO. OF AMBULANCE & HOSPITAL -

We presume someone has this e.g. on tel. pad.

-CHOICE OF HOSPITAL-DOCTOR -

Name & tel. of 'own' doctor is included in Kindergarten Registration form.

-LIST OF STUDENTS WITH SPECIAL MEDICAL PROBLEMS -

PE. "Health" - list of children with special health problems (by class)

EG. "Emergency File" - list of students and their allergies.

-ACCIDENT REPORT -

PM. "students Insurance - accident reports":- includes current student accident reports (standard forms.)

PE. "ACCIDENT-STUDENT ACCIDENT REPORT" - as PM above.

EG. "Student Accident Records & Policy" - as above

-INSURANCE - LIST - PC. "Insurance" - student policies & list of those covered.

+ accident claims forms.

+ blank insurance application forms.

PM. "Students Insurance - accident reports":- includes list of students enroled in accident insurance program.

PE. "ACCIDENT-INSURANCE-LIST of students insured with Dale & Co., ":- self explanatory.

EG. "Student Accident Records & Policy" - includes list of students,insured & correspondence with insurers.

$D_{1,1,6}$(b) ACCIDENT AND/OR SICKNESS OF STUDENTS:-
(RESULTS FROM)

-TELEPHONE NUMBER a)PARENT - as in (a) above.
b) ALTERNATE

-INSURANCE LIST - as in (a) above.

-MEDICAL REPORT - (if different from ACCIDENT report, it is probably with nurse)

-PARENTLA INFORMATION - (if stored anywhere it would be in teachers or principals anecdotal student files, eg. PE

-"HOME INSTRUCTION"-

PC. Blank Request forms. (rarely used)

PM. Summary of time allocated to Home Instruction (1970) + costs for tutoring & transportation

EG. Current request forms (completed) for H.I. plus records of time spent thereon.

-CORRESPONDENCE WITH INSURERS-

EG. matters arising from accident claims, principal acting for parents usually.

$D_{1,1,7}$ - COMMUNICABLE DISEASES -

- HEALTH UNIT DATA - HANDLING THE DISEASE -

- PREVIOUS PRECAUTION

- MEDICAL CONSULTATION

(no information found in files)

$D_{1,1,8}$ STUDENT WELFARE:

-FAMILY BACKGROUND - NURSE

PE Principals' Anecdotal file (on students with emotional or behavioural problems)

PE Background notes on one particular student

-O.S.R.- O.K.

-CHILDRENS AID - IF INVOLVED:-

EG. "Childrens Aid Society" - 1 pamphlet on how to spot 'Battered Children'.

EG. "Words of childrens Aid Society" - list of students applicable.

-TEACHER NOTIFICATION:- Nothing recorded.

-"WATER EXAMINATION REPORT": - EG. Certificates of school water supply satisfactories

-"NUTRITION REPORT -

EG Nutritive value of chocolate milk report.

-"DENTAL HEALTH EDUCATION"

EG Curriculum guide for program in dental health.

-DRUG ABUSE INFORMATION:-

EG. Pamphlets on use & abuse of various drugs.

$D_{1,1,9}$ DISCIPLINE OF MISBEHAVING STUDENTS.

-O.S.R.: - O.K.

-TEACHER ASSESSMENT:-

PE. "Class Profiles":- Teachers' Reports (JAN) to Principal No problems of group or individual nature in higher class.

-BEHAVIOURAL FILE:-

PE. Principals' Anecdotal File (on students).

PE.PE.EG. Notes on individual disciplinary cases with comments on interviews with teacher and parents. (Filed under student names).

-CONFIDENTIAL REPORT:-

PE. See above.

-PSYCHOLOGICAL REPORT:- (is this 'Psychologists' Report?; if so it is held by central office)

(may be some reports in Special Services Logs) This is highly confidential material and may be locked away in principals' desk or somewhere).

-DIAGNOSTIC GUIDE:-

PM. "Teacher Information":- includes checklist for the identification of emotionally disturbed students. (compiled and distributed by principal to teachers).

-RULES OF CONDUCT:-

PE "Routines (1970-71)" - Rules for conduct & discipline of school - advice from principal to teachers.

EG "Buses: Re student conduct:- notice to parents explaining bus conduct rules and penalties.

-INFRANCTIONS AND PUNISHMENTS FILE:-

PC "Handbook-Teachers" - states therein that a file is kept on students committing infractions and their punishments - haven't found it.
(Handbook is written by Principal and provides general information and advice to teachers.)

$D_{1,1,10}$ ATTENDANCE PROBLEMS

-BOARD POLICY - (every principal has an official Board Policy binder).

-REGISTER - (kept by class teacher except (for some schools) for short time at end of each term)

-TEACHER REPORT -

PM Absentee sheets:- circulated through all classes once or twice a week, to keep track of long absences. each teacher marks off "room", "name of absentee," "first date of absence and reason".

-ATTENDANCE OFFICER TEL. NO.:- (Central Office relays enquiries and requests to attendance officer since he is only there one day a week).

-ATTENDANCE OFFICER REPORT:-

EG "Counsellors Visits: Re Absents. - Mr. Irwin":- - attenaance counsellors Reports.

ATTENDANCE PATTERN - EG. Summary of absenteeism for selected students.

-LATE SLIPS - 68. Blank forms for sending to parents as warning re repeated latene

$D_{1,1,11}$ STUDENT PROGRESS PROBLEMS:-

-O.S.R. - o.k. - includes Ontario "Student Achievement Form" (filled in at end of year by class teacher).

- sometimes test results included.

-REPORT CARD - Duferin standard "Progress Report." forms for kindergarten, Primary, Intermediate, Junior, Special Education, (2 types), are made out by teacher for each student at the end of the term (Nov, Mar, & June). One copy to parents (white), one kept in OSR folder (Pink) & one to school permanent files in VAULT PC (Blue or in intermediate temporary office storage for two years e.g. PM. PC.

-"STANDARDIZED TEST:"-

EG.PE. Binder. PM. list of student scores on various standardized tests, (yearly eg. Gates McGuinty).

-NURSE REPORT - Nurses Files?

-EXPECTED ACHIEVEMENT LEVELS -

PE.PC. "Reading Program" - includes Gates reading survey, literature on pre-reading achievement adn how aquired.

PE. Diagnostic advice to teachers.

-TEACHERS ASSESSMENT -

PE. Class profiles - problems of group and individual nature.

$D_{1,1,12}$ INDIVIDUAL LEVEL ADJUSTMENT

See $D_{1,1,1}$

$D_{1,1,13}$ REMEDIAL INSTRUCTION USEFUL (See Central Office, Special Ed. files and forms)

-O.S.R. - O.K.

-REPORT CARD - (see $D_{1,1,11}$ above).

-STANDARDIZED TEST -

(see $D_{1,1,11}$ above + Special services Logs) PM.PE.EG.

-SPECIAL EDUCATION RECOMMENDATION -

PM. Nomination Forms for special programs (teacher and Principal)

PE Requests for "individual examination by specialist

EG List of pupils recommended for remedial help and pupils who have repeated one or more grades (gives 'grade', 'age', 'IQ' - 1969) copies.

PC.PE. Correspondence with Special Ed. Consultant re students under consideration for Rem. Inst.

+ Special Services Logs:- for consultants' opinions and findings.

-REMEDIAL CLASS LIST AND WAITING LIST.

Current class lists should be in Special Services Log, PM.PE.EG. also referrals.
+ PC. "Special Education, names, lists." Survey of pupils with learning problems and list of students to receive regular therapy and their dysfunction.

- also those under review.

PM. "Student Therapist Activities": - current list of students to receive remedial therapy.

EG. "Regular Therapy Students": - list of pupils to receive regular therapy and under observation.

-REMEDIAL REPORTS (CONFIDENTIAL) - PE.PC.PM.EG. anecdotal records and reports and meetings with parents.

$D_{1,1,14}$ ENRICHMENT USEFUL.

The term "ENRICHMENT" does not occur in any of the files or forms.

$D_{1,1,15}$ SPECIAL SERVICE ASSESSMENT USEFUL.

-TEACHER'S ASSESSMENT AND REPORT -
PE. "Special Education" - current copies of "Request for Individual Examination by Specialist" forms.

-REFERRALS - (Special Services Logs.)

-O.S.R. - O.K.

-REPORT CARD - (See $D_{1,1,11}$)

-HEALTH RECORD - (Nurses Files)

-CORRESPONDENCE WITH CONSULTANTS - PC.PM.

-SCHEDULES OF SPECIAL SERVICE STAFF VISITS. "Special Ed." PM

$D_{1,1,16}$ PSYCHOLOGICAL PROBLEMS OF THE STUDENT.

-TEACHER ASSESSMENT - no records (probably informal and recorded in principals' anecdotal files eg. PE

-PSYCHOLOGICAL REPORTS - (Special Services Log)
& see EG below.

-O.S.R. O.X.

-MEDICAL AND/OR HEALTH RECORD - (Nurses file).

-CHILDREN'S AID IF INVOLVED -

EG. "Wards of Children's Aid Society" - list of students

EG. Catholic Children's Aid Society - Psychological Reports

-COMMUNITY PSYCHIATRIC HOSPITAL GUELPH -

EG. "Confidential":- CORRESPONDENCE from Principal and teacher to Psych. Hospital re emotionally disturbed student.

-PRINCIPAL'S CONFIDENTIAL FILES-

PM. "Confidential Reports":- From principal to board consultants.

PE. "Principals' Anecdotal File" - notes re students needing his special attention, eg. discipline or emotionally disturbed.

PE. File on an individual student with a behavioural problem. Includes notes, reports on interviews with teacher, parents, etc.

EG. "confidential" - includes variety of correspondence re disturbed students.

-CHECKLIST FOR IDENTIFICATION OF EMOTIONALLY DISTURBED CHILDREN.

PE. "Aids for Teachers":- includes a checklist for the identification of emotionally disturbed children.

$D_{1,2,1}$ GUIDANCE DECISIONS FOR GR. 8 STUDENTS

-DATA FROM SECONDARY SCHOOLS -

EC.PM.PC. "Grade 8 - Promotion Lists & Progress at O.D.S.S.":-

PE. "Grade 9 ODSS English": Secondary school curriculum & course of study description: - option sheet.

EG. "Orangeville District Secondary School - Course of Study":- description of programs at ODSS,

- Correspondence with ODSS re XMAS marks of last years Gr. 8 graduates.

EG. "Promotion lists (June 71)":- March report of marks from Secondary School of former pupils.

-PROGRESS REPORTS) as described previously.

-OSR)

-GRADE 8 PROMOTION SHEETS:- PM.PC.EG (above)

-TEACHERS RECOMMENDATIONS -

EG "Promotion Reports" (1972):- Teachers' reports on order of merit and recommendations especially Grade 8.

-GUIDANCE LITERATURE -

PC.PM.EG. "Guidance":- pamphlets, booklets on various careers and qualifications.

$D_{1,3,1}$ POLICY ON STUDENT CARE OF FACILITIES

-BOARD POLICY - Principal's Board Policy Manual
-SCHOOL POLICY - Haven't found any formal statements of facility use policy.

$D_{1,3,2}$ STUDENT BREAKAGE:

-BOARD POLICY:- Principals' Board Policy Manual.
-SCHOOL POLICY - Nor formal statements
-MAINTENANCE REQUISITION FORM - Both blank forms PMPC.PE.EG. and Current Copies of Requisitions to Board PM.PE.PC.
-DAMAGE AND BREAK-IN REPORTS - Current. PE.PM. copies + blank forms.

$D_{1,3,3}$ USE OF SCHOOL EQUIPMENT BY THE STUDENTS

-BOARD POLICY - Principal's Board Policy Manual.

$D_{2,1,1}$ INTRODUCTION OF A NEW PROGRAMME

-COST FACTOR - PE.PE. "Science Curriculum" - elementary Science Curriculum & resources required by it. School Science Equipment Inventory.

-GENERAL ABILITY LEVEL OF CHILDREN AND THEIR NEEDS:-

PC. "Reading Program" - Survey results of pre-reading achievement.
- Gates reading survey Gr. 3-10, (materials and scoring sheet).
- summary of reading handicaps ad their diagnosis.

-RESOURCES AVAILABLE AND REQUIRED -

(For Inventories of existing equipment held and supplies see under INVENTORY $D_{2,2,4}$)

For Resources required:-

PC. "Reading Program," - order forms for texts.
PE. "Art":- outline of elementary Art program with suggested classroom equipment and supplies.

PE.PE. "Science Curriculum" (see above in cost factor).

For resources available, every school has a collection of supply catalogues (eventhough direct ordering no longer occurs) and also has access to or possesses the Min. of Ed's lists of recommended texts.

-SOCIAL IMPLICATIONS - nothing filed.

-COMMUNITY IMPLICATIONS-

EG. "Planning the Kindergarten Program":- Helpful hints to parents from principal.

-CURRICULUM DEVELOPMENT RESOURCE LITERATURE - PC.PE.EG.PM.

Inspirational curriculum development literature for various programs, eg.g. Art, reading, Maths, social studies, etc. (From a variety of sources, e.g. Workshops, conferences, Institutions, board committees).

-BOARD CURRICULUM COMMITTEES' REPORTS -

PM. "Curriculum Committees etc." - membership lists, addresses, notices of meetings.
PE. "Curriculum Development":- literature re local curriculum development.

PE. "Curriculum Committee Reports:" - set of minutes of a meeting.

PE. "Science Curriculum":- includes science curriculum Committee minutes and inventory of equipment needed.

PE. "Science":- science teacher's correspondence re curriculum development.

$D_{2,1,2}$ PHILOSOPHY AND IMPLEMENTATION, POLICY TYPE DECISIONS

-NEEDS OF THE SCHOOL AND COMMUNITY -

PC. "Philosophy of Education - Dufferin County":- schools aims and objectives + teachers' aims & objectives.

PC. "Board Policy, Information and Regulations manual".

PM. "Aims & Objectives (1972-73)":- 2 page memo from principal for teachers' and parents' benefit.

PE. " -teachers' submissions for the statement of objectives required in the September Statistical Report.

-FACTORS AFFECTING THE CHANGE -

PC. "Continuous Progress":- board policy and evaluations of continuous Progress.

PE. "Science Curriculum":- "includes directives from board office re adoption of new program.

-RESOURCE NEEDED FOR CHANGE -

PE. "Science Curriculum" - describes equipment needed and supplies.

PE. "Art":- suggested classroom equipment for elementary art program.

-PHYSICAL REQUIREMENTS OF THE SCHOOL TO ADAPT TO SUCH A CHANGE - Nothing.

-COMMUNITY COOPERATION - mainly circulars informing parents of changes.

-RESEARCH FINDINGS & REPORTS OF CURRICULUM COMMITTEES. -

PE. "Science Curriculum":- includes Science Curriculum Committee minutes.

PE. "Curriculum Committee Reports":- set of minutes of a meeting.

PC. "Special Reports from Board."- reports on Special Education, various studies undertaken and their recommendations.

-GENERAL CURRICULUM GUIDELINES & DIRECTION -

Curriculum guides, notes, papers, etc. re various programs e.g. Art, Maths, Music, Lang. Arts, Science. Also more general directions for program development, i.e. objective setting, testing, curriculum planning (for teachers and curriculum committees' use).

$D_{2,1,3}$ WHAT WILL ELECTIVES (IF ANY) BE?

-INTEREST OF TEACHERS -

EG "Electives":- club/teacher/room list.
EG "Summary of Resource Personnel":- includes list of teachers with specialisations.

-INTEREST OF PUPILS-

PC. "School Activities - Schedule etc.":- includes list of students in Gr. 7, 8 and their elective(s) e.g. woodcarving, aeroplane modeling, drame, sewing, etc

PE. "Electives":- (same as PC above).

-FACILITIES -
-PARENT INVOLVEMENT (COMMUNITY) - EG.PM. "Parent-Teachers Aid," =
-TIME DURING DAY - list of volunteering help.
PC. "Timetables":- All schools have teachers' timetables available.

-ECONOMIC REQUIREMENTS:- nothing found.

$D_{2,1,4}$ ASSESSMENT OF ONGOING PROGRAMME

-EFFORTS (a) WRITTEN) teachers and/or students have these.
(b) ORAL)

-OBJECTIVES:-

PC. "Reading Program":- gives skill level objectives.
PE. PM. "Aims and Objectives":- principal's and teachers' submissions for the statement of objectivies on September Statistics.
PE. "Primary Programme-Levels: - Description of objectives, levels, skills to be acquired.
PE. "Science":- includes science program aims and objectives.
similarly EG "Language Arts", EG. "Reading Program"

EG. "Teachers' Guidebook 1972":- from principal to teachers, gives advice on program development, objective setting, evaluation etc.

-RESOURCES -

PM "School Supplies File:- Art Supplies (Sept-Dec), Office Supplies, Audio Visual supplies, Books.

EG. PM. "Audio-Visual":- includes capital equipment inventory.

PM. "Equipment: Capital & Replacement Requests 1969": - now mostly obsolete except to answer such questions as, how old is the typewriter?

PM. "Film strips, records, etc.":- list of films reviewed (mostly 1969).

PM. "Parent-Teachers Aid":- list of parents volunteering help.

PM. "Resource Centre":- Description of new library and resources available + list of library books on order (from librarian).

PM. "Usable Texts and Supplies,":- inventory of usable textbooks from each class teacher (beginning of year).

PE. "Back Orders":- Teachers' classroom games' orders and other miscellaneous equipment.

PE. "Capital-Audio-Visual-Text orders: - similar to "back-orders" (above) + invoices of equipment.

PE.PE. "Films" & Filmstrip Library";- list of films held by subject area/level - No. of copies & name.

Also evaluation slips for films viewed.

PE. "Science Curriculum":- includes supplies and equipment requirements of this program.

PE. "Spelling Survey":- explanatory & testing materials for using and scoring the Buffalo Spelling Scale.

EG "Cassette Tapes List":- list of titles.

EG. "Parents-Volunteer Work": - recruitment literature, + list of possible tasks volunteers might undertake.

EG. "School Equipment & Serial No.":- equipment (e.g. furniture) inventory, gives Article, description, serial No. - (Probably out of date)

EG. "Spelling Test":- copies of standardized spelling tests.

EG "Teaching & Reading Aids":- includes text-book lists.

EG "Textbook Orders (1972)":- Ministry of Ed. catalogues of approved text-books for each grade level.

EG "Textbook Survey (FALL-SPRING 70-71)" - lists by room.

PC "TEST MATERIALS":- standardized blank test forms, e.g. IOWA Basic Skills.

PC "Audio-Visuals" - correspondence & Advertising from Film Suppliers.
- evaluation forms for ED T.V.
- list of available films.

PC "Supplies":- - Summary of capital requisitions + set of consumable order forms, e.g. for paper, plasticene, newsprint paint.

59. "Instructional Supplies":- forms supplied to teachers for them to indicate class supply requirements (from catalogues). These are collected by vice-principal, aggregated and sent to central office.

For teachers considered as programme resources, se $D_{3,1,2}$ for lists, evaluations, etc.

-SUITED TO INDIVIDUAL -
PE. "class profiles":- from teachers to principal, problems of a group or individual nature.

-INTEREST-

-USE OF TIME - PE. PM. PC. "Timetables":- one per teacher.
PM. "Home Instruction:- summary of time spent on Home Instruction in 1970.

-INVOLVEMENT - There exists a board form called "Evaluation of School Programme" PE, not sure how it is used because have only found blanks. Seems to be primarily for the evaluation of teachers rather than programmes.

-SKILLS ACQUIRED - in addition to O.S.R.'s and progress reports there are the following information sources:-

PC "Marks-Report Cards";- end of term marks from each teacher.

PM "Term Report Cards & Mark Sheets":- end of term marks for each class.

PM "Standardized Tests":- lists of student scores on various standardized tests.PE

PE Student Achievement records:-

PE "Continuous Progress-Reading":- skills booklets level system reading program (sample)

PE See INVOLVEMENT above.

- PRE-PROGRAMME ACHIEVEMENTS -

PC "Reading Program" - includes results of survey of -pre-reading achievement and how acquired,

- PE.PM.PC. "Course outlines" prepared by teachers for review by principal.- variety of programmes stored together.

$D_{2,1,5}$ DECISION ON OLD/NEW PROGRAMMES MIX FOR NEXT YEAR

- USE OF $D_{2,1,4}$ INFORMATION SHEET - We have not found such a sheet anywhere.

- NEW SITUATIONS WHICH HAVE DEVELOPED -
PM "Additions to School":- progress of present buildings and plans: Proposed uses of additional space.

- ADVICE OF REGIONAL PROGRAMME CONSULTANTS -

EG.PE. "Programme Consultants":- file contains:- completed 'Request for Consultation' board forms
- list of programme consultants and their specialities
- principal's notes and reporting of past visits
- visiting schedule for the year.

- TEACHERS' COURSE OUTLINES/PLANS

PE Informal submissions of long range plans from some teachers.

PE.PM.PC "Course outlines" - (see above)

$D_{2,1,6}$ ADJUSTMENT OF PROGRAMME

- COST - no breakdown of cost for specific programmes (either past or future) has been found.

- However by referring to Requisition and inventory data (see BUDGET section) the principal could estimate additional costs.

- ADAPTATION TO PHYSICAL PLANT

PM "Additions to School":- progress of present building and plans; proposed uses of additional space, etc.

Other sources of information concerning physical plant would be found in Requisition and inventory data (BUDGET SECTION)

- ASSESSMENT OF PRESENT PROGRAMME -

No summary of the disaggregated data described in $D_{2,1,5}$ and $D_{2,1,4}$

- ADAPTATION OF TEACHER TIME -

PM.PC. "Timetables"- Current teachers' and principals' timetables (only upper grades on rotary so teachers mostly in their permanent rooms)

- ADAPTATION TO SKILLS & SPECIALITIES OF TEACHERS (Both OLD and NEW)

Main source of information on current teaching staff's certification and specialities is the boards Teacher Record Cards. PC.PM.EG.EG.PE.

Also for newly hired teachers: -

PC. "Teacher Applications":- Copies of board "Teacher Interview Forms
- principals confidential report on applicants who had been interviewed

"Teacher Information"

PM.EG. "Summary of Resource Personnel":- list of teacher specialists.

- ALTERNATIVE INSTRUCTIONAL MATERIALS - (e.g. lists and, catalogues of films, textbooks, equipment, etc.)

This kind of material forms a large portion of the files. Sometimes the information is filed under

a) programme or curriculum heading:
e.g. PM Special Education PE "Mathematics" PE "Science Curriculum" PE "Summer Programme"

b) equipment type:-

e.g. PC.EG. "Audio-Visuals", PE. "Novels" - EG Film information EG "Novel list" (by suggested grade level) EG. "Textbook orders (1972)":- (ODE catalogues of textbooks by grade level) EG "Textbooks - ODE Circular 14":- (index of approved texts ODE). EG "Cassette Tapes List":-

c) separate catalogue files - usually filed alphabetically by suppliers name, but sometimes by subject e.g. "Athletics". Since there is no direct ordering (to suppliers) now these catalogue files are not used much except about once (or twice) a year for making up requisition forms for textbooks, films, etc. The suppliers still send catalogues to the school.

$D_{2,1,7}$ ADJUSTMENT BROUGHT ABOUT TO OR BECAUSE OF $D_{2,1,2}$

- COMMUNICATION OF SCHOOL & BOARD POLICY TO PARENTS, TEACHERS, STUDENTS

PC "Continuous Progress" - includes memos to parents explaining this philosophy.

PE "Board Minutes" PE "Kindergarten Correspondence" - from kindergarten teacher and principal to parents, telling what clothing and equipment is required.

EG.PE "Letter to Parents - Level system":-

EG "Parents Letters to Principal":- copies of letters sent to parents.

EG "Teacher's Guidebook 1972".- principal to all teachers, giving advice on program development, evaluation, etc.

$D_{2,1,8}$ AREAS OF SCHOOL CONCENTRATION

- GRADE (OR YEAR) CONCENTRATIONS - NUMBERS -

Generally this information is regularly prepared for the monthly attendance reports & the Sept. Statistical Report.

Also filed under

PC "Enrolment" - past enrolments (by grade) and projection for this year.

PC "School Organization":- copies of the reports sent to superintendant of Education (MARCH), giving present organization and Sept. organization i.e., Table of grade Enrolment Teachers (form G.49)

PC "Attendance Record Book" - running record of Date of Registration, Grade of Entry, Name, From, To, Total enrolment.

PC "Class Registration Books" also could be used to obtain grade concentration

EG "Classroom Lists":- ordered by grade and alphabetic within.

- ACADEMIC NEEDS OF STUDENTS -

PC "Reading Program":- gives results of a pre-reading achievement survey.

EG.PC "School Activities-Schedule etc.":- gives student electives (gr. 7, 8) e.g. woodcarving, drama, sewing etc.

PE "Class profiles" - in JAN. each teacher sends an account of class problems of a group & individual nature.

- QUALIFICATIONS OF TEACHERS -

Main source is Teacher Record Cards file (see $D_{2,1,6}$ (ADAPTATION TO SKILLS....) and September Reports
PC.PM.PM.PE.EG.

- PHYSICAL CAPABILITIES OF SCHOOL PLANT -

PM "Floor Plan of School" PE "School Map".
PM "Resource Centre":- Description of new library and resources available

PE "Rated capacity of each School":-

$D_{2,1,9}$ EXTRA CLASS LEARNING - ATHLETIC ASSEMBLIES ETC.

- PLANT CAPABILITIES: -

PC "Swimming" - receipts for rental of pool

PM "Floor Plan" of school.

PM "Hockey Rules & schedules":-rental of rink correspondence.

- TIMETABLE AVAILABLE TIME IN LEARNING AREAS -

PE.PC "Field Day":- includes past schedules and programme

PC "School Activities-Schedule etc.":- variety night programme, Easter Play.

PM.PC "Timetables":- current teachers timetables, one per teacher

PM "Calendar of Events" (1972-73):- 2 timetables about special services personnel visits

PE "Concerts":- programmes for Closing Assembly 71 & variety night 72

PE "Hockey":- inter-school schedules

PE Playday 1971":- schedule

PE "Routines Booklet for opening week":- general information for teachers on opening day

PE "Sports Rules":- Field day program

PE "Spring Concert" (72):- Programme

PE "Track & Field":- schedules

PE " Winter Carnival (71)":- dittos of timetables

EG "Fall Fair-Orangeville": programmes

EG "Field Day Information":- timetable of events

EG "Playday":- old programmes for playday.

- NUMBER OF CLASSES:- ?

- AGE AND/OR GRADE LEVELS:-

PC "School Activities - schedule etc.":- student electives by grade

PM "Electives":- lists of students with given elective, grade and class where held.

- STAFF NEEDS (& - ASSIGNMENTS):-

PE.PM "Extra Curricular Activities of Staff":- staff assignments to sports and yearbook; safety patrol, kitchen, etc.

PE "Opening Day":- procedures to be carried out by principal & teachers on opening day, - duties, chores, etc.

PE "Routines":- Booklet for opening week - general information for teachers on opening day.

- RESOURCE LITERATURE ON EXTRA-CLASS ACTIVITIES -

PC "Newspaper in classroom":- notes on doing a class newspaper.

PM "Play-day":- lists of fun activities for kindergarten Play Day.

PE "Fund Raising": - suppliers catalogues of gifts etc. for fund raising activities.

PE "Rememberance Day File":- suggestions as to activities to be undertaken on R.D.

PE "Winter Carnival":- various materials associated with winter carnival + prize essays & poems.

EG "Fall Fair-Grand Valley":- submissions and activities list.

EG "School Newspaper" (72-73):- 1 copy as an example.

EG "Student Council (72-73)":- agendae of meetings, procedures for election of members.

$D_{2,1,10}$ FIELD TRIPS, COST, TRANSPORTATION ETC.,

- OBJECTIVES OF TRIP:-

PC.EG.PE "Report of excursions":- notes on visit to Ottawa, includes objectives of trip PM

PC.EG.PM.PE. "Overnight excursions (Request Form)" PM - copies of "Request
EG. for overnight excursion",forms (G37), which should include objectives of trip.

OBJECTIVES, LENGTH OF TRIP, LEARNING ACTIVITIES, FUND RAISING ACTIVITIES, COST AND TYPE OF TRANSPORTATION, COST OF OVERNIGHT ACCOMMODATION, are all covered by the two Board forms. However it is not clear why there should be two forms since an 'overnight excursion' PM is just another type of excursion with extra (accommodation) costs and teacher supervisory duties. Also the title 'REPORT ON EXCURSIONS' PM is somewhat misleading since it is really a request form completed before the trip. In fact there does not appear to be a formal post-trip reporting procedure or form.

- PARENT INVOLVEMENT -

EG.PM Some schools have "Bus permission slips", which are taken home by children intending to go on an excursion by bus, and are returned with the consent and signature of the parents.

- WHO WENT WHERE ?

PC Who went where last year - student lists.

- CORRESPONDENCE & LITERATURE ON POTENTIAL EXCURSIONS

PC "Correspondence on Excursions":- notes and brochures, pamphlets on places to go in Ontario

PC "Tours":- Brochures on tours in Ontario + yearly tour plan for various grade levels.

PE.PM "Excursions":- includes literature on places to go.

PE "Ontario Science Centre":- promotional literature from OSC

EG "Outdoor Education":- Curriculum bulletin from ODE i.e.'Education outside the classroom'

- schools own programme of field trips.
- memos from ODSS re the 'See Dufferin first' project.

$D_{2,2,1}$ BUDGET, TWICE YEARLY MATERIAL (TEXTS, LIBRARY, CONSUMMABLES, SPEC. ED.)

- NUMBER OF PUPILS -- REGULAR CLASS, SPECIAL ED. -

Many sources of this data, e.g. class lists, monthly attendance reports, registers, etc.

- SPECIAL NEEDS OF TEACHERS FOR SPECIAL PROGRAMME -

PC.PC.PM Filed under a varie y of headings; i.e. Consumable Order Forms,
PE.PE.EG Instructional Supplies, etc.

It seems that principals circulate to each teacher, either their own dittoed Budget requirements form, or, copies of the Maintenance Budget Request forms, which are then completed and returned to either Principal or Vice-principal to be aggregated on a single master copy "Maintenance Budget Request" form and sent to Board Office. The data requested by the principal is usually suppliers name, catalogue no., quantity, item description, unit price, total price, room, grade. (samples can be found in school folders).

Also most schools have back copies of the completed Maintenance requisition forms which were sent to the central office.

- EXISTING SUPPLIES -

PC "Supplies":- summary of capital requisitions NOV 71

PM "Inventory":- lists of current texts held with price & quantity.

Also Quantity, ITEM, purchase date, original cost, of classroom equipment.

EG. PM. "Budget - Supplies & Texts (consumable)":- Computer printout from board giving school's monthly expenditure and remaining budget funds.

EG. PM. "Purchase Orders (72-73)":- from board for verification of reception of orders:- sent back to central office upon receipt of supplies. See sample G.58 (central office Forms).

PM. "Usable Texts and Supplies":- inventories of number of usable textbooks from each class teacher.

EG. PE. "Consumable Order":- out of date back copies of Main Budget requests.

EG. PE. "Invoices 1971-73"; - package slips and invoices for delivered equipment and supplies, to check requisition & budget statements.

EG. "Novel List (Sept. 72)":- extra novels in stockroom with suggested grade level.

EG. "Textbook Survey (FALL-SPRING 70-71)":- lists by room.

EG. "Textbook Order (1972)":- schools own textbook order record book, giving quantity, unit cost, total cost, suppliers' name.

- PROJECTION OF NEEDS -

PM. "Catalogues":- used for estimating prices and seeing what new Drawer supplies & equipment are available.

PE. "Requisitions (72-73)":- current requisition forms from each teacher for JAN 73. Budget.

EG. "Textbooks - ODE Circular 14:" Index of approved textbooks. (by grade level).

EG. "Textbook Survey (FALL-SPRING 70-71)":- lists by room.

EG. "Science-Resource Materials":- ODE intermediate science guidelines, price lists of equipment, science text book lists.

Projections of future needs might also be done by referring to past Maintenance Budget Request forms (see SPECIAL NEEDS---above) and extrapolating.

-ACCOUNTING -

PE. "Back Orders":- list of back orders to supplier firms and which classes requested the order, to check that deliveries requested were made.

$D_{2,2,2}$ BUDGET TWICE YEARLY MATERIALS/INDUSTRIAL ARTS.

Nothing found.

$D_{2,2,3}$ BUDGET ONCE YEARLY MATERIAL-SPORTS EQUIPMENT

- EQUIPMENT INVENTORY -

PE. "Jack Watson - SHORTS-T SHIRTS":- Invoices for sports purchases.

EG "Sports Inventory":- inventory of sports equipment (1972).

- NEEDS AS RELATED TO PROPOSED PROGRAMME -

PC. "Physical Education":- general information plus suggested equipment list.

- PROJECTED COST FACTOR -

PC. "Swimming":- receipts for rentals of pool.

PM, etc. Equipment catalogues, giving prices.

$D_{2,2,4}$ BUDGET ONCE YEARLY MATERIAL

(Audio-Visual, Capital Equipment, Oral French, Remedial and Enrichment, Music, Science Supplies & equipment, art, novels.)

- INVENTORY OF PRESENT EQUIPMENT -

EG.PM.PC. "Audio-Visuals":- includes lists of films available.

PC. "Capital Equipment":- copies of budget requisitions to board.

EG. PM. "Inventory": classroom equipment lists with room no. quantity, Item, purchase date, original cost.

PM. "Kindergarten:-" list of equipment used with prices.

PE. "Instruction Budget":- short inventory of special equipment (replacements) for 70-71 with suppliers' name and price

PE. "Science curriculum":- includes Inventory of Science equipment.

PE. "Films":- includes list of films available at school until Oct.

PE. "Filmstrip Library":- list of films available at school until Oct.

PE. "Filmstrip Library":- list of films held by subject area and level - No. of copies, title.

PE. "Long Range Plans- 2nd Term":- informal curriculum plans of teachers.

- PROFESSIONAL DEVELOPMENT INVOLVEMENT -

PM. PC. "Teachers Record Cards" - contains current qualification and certification of teachers.

- TEACHERS SELF APPRAISAL OF CLASS PROCEDURES.

PM. Standard school form. prob. obsolete. 90

- REPORT ON PROBATIONARY TEACHER (Board Forms). G.31

EG. "Teacher Reports - Confidential-Current:- Suptl of Curr. reports.

PE. Teacher Reports - Past: - evaluation notes on Prob. Teacher by Princ.)

PE. Probationary Teachers (Rating Forms):- (master ditto).

PE. Principals' Anecdotal File - Teachers.

- PRINCIPAL'S REPORT ON CLASSROOM VISITATION -

PC. "Classroom Visitation" - 1 copy to teacher, 1 board, 1 retained.

- TEACHER EVALUATION FORMS - (Board form may be obsolete).

PE.PM. "Evaluation":- Current evaluation form (blank) to assist principal in teacher Evaluation + notes & teacher evaluation procedures.

$-D^*_{3,11}$ ASSESSMENT OF PRACTICE TEACHERS.

PC. "Teachers College":- copies of student teacher appraisal reports (from PE Principal and Associate Teacher to College) + handbook for practice teaching program.

PM. "Practice/student Teachers":- Records of No. of practice teachers and No. of hrs. each spent teaching, + evaluation record forms (appraisal reports).

$D_{2,2,5}$ BUDGET, WEEKLY MATERIAL - HOME ECONOMICS

Nothing found on - Long Range Plans
- Short term plans
- No. of Students involved
- Suppliers -- Cost.

But add:-

EG. PM. "Petty Cash: 72-73" - record of expenditures ($50 float) - monthly statements to board -

EG. EG. "(Milk) Account:- receipts and cheques from Diary for student milk.

"Acct.":- cancelled cheques for groceries & miscellanea.

EG. "Phone Calls":- Booklet of long distance phone calls (by staff) - date, called - purpose.

$D_{3,1,1}$ ASSESSMENT OF PROBATIONARY TEACHERS & ASSESSMENT OF PRACTICE TEACHERS

- TEST MARKS OF STUDENTS (COMPARED TO PREVIOUS) -

PC. PM. "Term Report Cards & Mark Sheets" for 2 years.

PM. "Standardized Tests":- lists of student scores on various tests - usu. reading.

EG. "Special Test Results": - standardized tests Gr. 4-7.

- TEST MARKS OF STUDENTS (COMPARED TO OTHER STUDENTS) - OF SAME LEVEL.

Sources as above - particularly standardized tests:

-ATTITUDES (OBSERVABLE MEASURABLE) OF STUDENTS -

PE. Principals anecdotal file:-

PE. "Class Profiles":- 1st JAN. - teachers report on problems of gou group or individual nature in his day

-CURRICULUM DEVELOPMENT INVEOLVEMENT -

PM. "Subject Outlines (70-71)":- teachers course outlines & curriculum notes.

EG. "Cassette Tapes List":- list of tapes (titles held).

EG. "Map Inventory":- list of maps (titles held)

EG. "School Equipment & Serial No.";- office & classroom, staffroom Library furniture. (Article, description, serial no.)

- OBJECTIVES OF THE PROGRAMME - see $D_{2,1,4}$.

- NUMBER OF STUDENTS TO TAKE PART -

- REPLACEMENT OR NEW -

This information could be obtained from current requisition forms. PC. PM. and Inventories, invoices etc.
Plus PM. "Equipment: Capital & Replacement Requests "1969":-
- Now obsolete except for references such as how old is typewriter?"

PM. "Purchase Orders (1972-73)":- from board for verification of reception of

PE. "Capital":- (old maintenance budget Requests.)

PE. "Capital - Audio Visual - Text Orders":-

EG. PE. "Invoices": 1971-73":- packa g e slips and invoices to check requisitions and budget statements.

EG. PE. "Maintenance - Budget" etc.:- Maintenance Budget requests - Capital Items.

EG.PE. "Requisitions (72-73)":- Current requisition forms from teachers - i.e., for JAN 73.

EG. "Purchase Orders":- (Current Purchase orders (blue form) invoices, packing slips, etc.

- SCHOOL BANK ACCOUNT (YEARLY STATEMENT) -

PM. "School Bank Account": - for end of year accounting report (JUNE) - Debit - credit - statement.

APPENDIX D

SECONDARY PRINCIPALS' INDIVIDUAL DECISION LISTS

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decision: Give a name and a brief description	Frequency	Time of Year	Area of decision
Decision	1	What courses to list on the option sheet	once a year	Jan	Curriculu
"	2	What format of option sheet	once a year	Fall	Curriculu
	3	What courses to offer when results of option sheets are known	once a year	Feb	Curriculu
"	4	How many sections of each course to offer	once a year	Feb	Curriculu
"	5	What rooms to assign to each course	once a year	Mar	Facilitie
"	6	What teachers should be hired, based on teacher-pupil ratio	once a year	Mar	Recruitme
"	7	How many times to advertise each position	as need arises	March - June	Recruitme
"	8	What ratio of teacher to paraprofessionals to fill teacher-pupil ratio	once a year	Feb	Recruitme
"	9	How many classes should each teacher teach	once a year	Feb	Curriculu
"	10	How many classes should Department Heads teach	once a year	Feb	Curriculu
"	11	How many classes should Program Supervisor teach	once a year	Feb	Curriculu
"	12	How many classes should Vice Principal teach	once a year	Feb	Curriculu
"	13	How many classes should Chairman teach	once a year	Feb	Curricul
"	14	How many classes should Assistant Department Head teach	once a year	Feb	Curricul
"	15	How many classes should Principal teach	once a year	Feb	Curriculu
"	16	What classes each Vice Principal is responsible for discipline and attendance	once a year	June	Attendan

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign # No	Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision 17	What classes is Principal responsible for discipline and attendance	once a year	June	Attendanc
" 18	What subjects belong to each area of study	once a year	Spring	Curriculu
" 19	What should the format of course description booklet be	once a year	Fall	Curriculu
" 20	How many parents night should there be	once a year	Sept	Public Relations
" 21	Should there be a dress code for the school, for students	once a year	June	Student Service
" 22	Should there be a dress code for the teachers	once a year	June	Public Relations
" 23	Should attendance be compulsory for those over 16	once a year	June	Attendanc
" 24	Should attendance be compulsory for those over 18	once a year	June	Attendanc
" 25	Should classes be cancelled if teachers are absent	once a year	June	Attendanc
" 26	Should Department Heads have autonomy on assigning classes to teachers	once a year	June	Professic
" 27	Should Department Heads have autonomy in curriculum	once a year	June	Professi
" 28	Should Department Heads have autonomy on field trips	once a year	June	Professi
" 29	What budget requirements should be submitted	once a year	Fall	Budget
" 30	What should be the ratio of capital to supplies budget	once a year	Fall	Budget
" 31	How should the budget be divided by department	once a year	Jan	Budget
" 32	Should Department Heads have autonomy on the budgets	once a year	June	Budget

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
Decision	33	When decisions are made by Senior Administration which you don't approve, when should you; (i) ignore (ii) follow without discussion (iii) protest mildly (iv) protest vigorously (v) blow your stack	as they occur		Personnel
"	34	Should you have examinations	once a year	June	Curriculu
"	35	How often should you have examinations	once a year	June	Curriculu
"	36	When should you have examinations	once a year	June	Curriculu
"	37	Should evaluations be left to the Department Heads	once a year	Sept	Curriculu
"	38	Should there be promotion meetings	once a year	Spring	Curriculu
"	39	What should the promotion policy be	once a year	Spring	Curriculu
"	40	Should teachers be at school during examinations if they are not presiding	once a year	Fall	Personnel
"	41	Should summer school be encouraged	once a year	June	Curriculu
"	42	Should free time for students be encouraged		all year	Attendanc
"	43	Who should be given permanent contracts	once a year	Spring	Personnel
"	44	Who should be fired	once a year	Spring	Personnel
"	45	Who should build the time-table	once a year	Fall	Facilitie
"	46	Where should computor assistance be purchased	once a year	Fall	Facilitie
"	47	Should students be allowed to change or drop courses	once a year	June	Curriculu
"	48	Should school participate in sports	once a year	Spring	Ext. Curr

Name: J.J. McFadden

Title: Principal - O.D.S.S.

Assign a No		Decision: give a name and a brief description	Frequency	Time of Year	Area of decision
decision	49	What sports should school participate in	once a year	Spring	Ext. Cur
	50	Can time be taken off class for an extra curricular activity	as they occur		Ext. Cur
	51	Should the buses be called because of a snow storm	as they occur		Transpor ation
	52	When should there be a fire drill	as they occur		Faciliti
	53	When should there be an assembly	as they occur		Student service
	54	How many school dances are allowed	once a year	May	Ext. Cur
	55	When should Commencement be held	once a year	Spring	Student Service
	56	What should be the format of the Commencement	once a year	Spring	Student Service
	57	Should approval from the Ministry be obtained for a course	as they occur		Curriculu
	58	Should approval from the Ministry be obtained for a text book	as they occur		Curriculu
	59	How much autonomy should be given Department Heads for curriculum	once a year	Spring	Curriculu
	60	How much autonomy should be given the Librarian	once a year	Spring	Student Services
	61	Should the library be opened at night'	once a year	Sept	Student Service
	62	What procedures should be used for visitors to the school	once a year	June	Student Services
	63	What Home Room system should be used	once a year	Spring	Student Service
	64	How should attendance be marked	once a year	June	Attendanc

J.J. McFadden

Principal - O.D.S.S.

Decision	65	How much say should the Department Heads have in selection of teachers	once a year	Spring	Recruitm
"	66	How many secretaries should there be and what should each do. This is under guideline of Board	once a year	June	Personnel
"	67	How should teachers be developed professionally	various times		Professi Developm
"	68	When should inservice training be done	once a year	June	Professi Develop
"	69	What inservice training should take place	as need arises		Professi Developm
"	70	What duties should paraprofessionals do	once a year	Spring	Personne
"	71	Who should use the P.A.	once a year	June	Personne
"	72	When should the P.A. be used	once a year	June	Faciliti
"	73	When should teachers be sent to visit at another school	as need arises		Professi Developm
"	74	Should students be given a Credit at a lower level if unsuccessful in a more difficult course	once a year	June	Curricul
"	75	Should staff be aware of things like budget, planning, Board policies, etc, or should the attitude be that the less they know the better	once a year	anytime	Personne
"	76	Should the Principal meet with the Student Council	once a year	June	Student Services
"	77	Should projects be made for the County in the Shops	once a year	Sept	Curricul
"	78	What recommendations go to the Senior Administration for renting or buying captial equipment	once a year	Fall	Faciliti

Name: J.J. McFadden

Title: Principal - O.D.S.S.

					Area of [illegible]
Decision	79	What supervision of teachers policy should be followed	once a year	June	Personnel
"	80	What policy changes should be recommended to Senior Administration	as need arises		
"	81	When should staff meetings be held	as need arises		All areas
"	82	What committees should be appointed	as need arises		All areas
"	83	What salaries should be recommended for non-teaching staff	when requested		Personnel
"	84	What salary should be requested for Principal	once a year	March	Personnel
"	85	What innovations should be pursued	as need arises	Spring	All areas
"	86	Should all students write final exams	once a year	Fall	Curriculu
"	87	Who should write final examinations	once a year	Fall	Curriculu
"	88	If a student passes final examination should he receive Credit for the course	once a year	Fall	Curriculu
"	89	What should be done the first day of school	once a year	June	All areas
"	90	How much authority should be delegated to the Head Secretary	once a year	June	Personnel
"	91	Should the school office be open 12 months of the year	once a year	June	Staff Services
"	92	Should a semester or tri-mester system be operated	once a year	Fall	Curriculu
"	93	What parking arrangements should be made for students	once a year	Sept	Student Services
"	94	Who should have keys to the school and each area in the school	once a year	June	Personnel
"	95	How long should the periods be	once a year	Spring	Facilitie

Decision	96	Should there be belts in the school	once a year	Spring	Facilit
"	97	Should students be allowed to take employment before the end of school	once a year	Spring	Student Services
"	98	Should a smoking area be in the school	once a year	June	Student Services
"	99	What method should be used for handling text books	twice a year	Sept & June	Student Service
"	100	How should lockers be issued to students	once a year	June	Student Service

CENTRAL DUFFERIN D.H.S.

Name: D. G. Anderson

Title: Principal

Assign a No.	Decision: give a name and a brief description	Frequency	Time of Year	Area of Decision
1	Designing student course booklet	once a year	Nov.	Pupil Services
2	Pupil Course Requirements	once a year	Jan.	Pupil Services
3	Economic Feasibility of Course	once a year	Feb.	Logistics
4	Staff needs in hiring	once a year	Mar.	Personnel
5	Assigning Staff to Specific tasks for year--promotion	once a year	May	Pupil Services
6	Planning Grade VIII Integration	As need arises	May-Sept.	Pup. Ser. Logistics
7	Allocation of Budget-Supplies and Capital	yearly	Dec.	Logistics
8	Review of Budget Spending	monthly	Sept.-Aug.	Logistics
9	Method of Reporting to Parents	yearly	May/June	Stud. Ser.
10	Promotion Policy	yearly	May	Stud. Ser.
11	Number of sets of exams	yearly	June	Stud. Ser.
12	Agenda for staff meetings	monthly	Sept.-June	Logistics
13	Evaluation of Staff	yearly	Mar.	Personnel
14	Facility-use	as need arises	Sept.-June	Logistics
15	Maintenance of facilities	yearly	Feb.	Logistics
16	Busing - cancellation due to WX	as need arises	Dec.-April	Logistics
16a	Busing - normal	as need arises	Sept.-June	Logistics

Name: D. G. Anderson

Title: Principal

Assign a No.	Decision: give a name and a brief description	Frequency	Time of year	Area of Decision
17	Commencement Arrangements	yearly	Sept.	Pupil Services
18	Method of handling text books	yearly	June	Pupil Services
19	Method of collecting books	yearly	May	Pup. Ser.
20	Opening Day Procedures	yearly	June	Pup. Ser. Personnel
21	Closing Day Procedures	yearly	May	Pup. Ser. Personnel
22	Exam Timetables - allocation of students	as need arises	Dec. Mar. May	Pupil Services
22a	Exam Timetables - allocation of staff residing	as need arises	Dec. Mar. May	Personnel
23	Student Conduct	as need arises	Sept-June	Pupil Services
24	Interpretation of regulations & policy	as need arises	Sept-June	Pup. Ser. Personnel
25	Designing Student Handbook	yearly	April	Stud. Ser.
26	Student Projection	yearly	Jan.	Logistics
27	Student Assemblies/ Production	as need arises	Sept-June	Student Services
28	Field Trips	as need arises	Sept.-May	Stud. Ser. Logistics
29	Special Staff Courses - Attendance	as need arises	Sept.-June	Personnel
30	In-Service staff programs	as need arises	Sept.-June	Personnel
31	Staff to attend Curriculum Committees	yearly	Sept.	Personnel
32	Changes in curriculum-- course outlines to be used, new subjects to be offered	yearly	June	Stud. Ser. Personnel

Name: D. G. Anderson

Title: Principal

Assign a No.	Decision: give a name and a brief description	Frequency	Time of year	Area of Decision
33	Participation of School in athletics	yearly	Sept.	Stud. Ser. Personnel
34	Student council - Projects and Activities	as need arises	Sept.- June	Stud. Ser. Personnel

APPENDIX E

AMALGAMATED LIST OF SECONDARY PRINCIPALS' DECISIONS, INFORMATION REQUIREMENTS AND TIMING

PART ONE: SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS

PART TWO: SECONDARY PRINCIPALS' DECISIONS (STANDARDIZED) AND TIMING

PART ONE

SECONDARY PRINCIPALS' DECISIONS AND INFORMATION REQUIREMENTS

SECONDARY PRINCIPALS' INFORMATION REQUIREMENTS

	DECISION	INFORMATION
1. ORGANIZATION A. To Open School	1. What rooms to each course, (note special requirements)? 2. Assign subjects to areas of study. 3. Pupil course requirements. 4. Where should and how much computer assistance be purchased.	Timetabling, Reporting, Recordkeeping Recordkeeping - student achievement form (OSR) - student info sheet - courses Dept. of Ed. - on tape/P.O. to school Access frequency - updates ANA - sometimes from Board, i.e., non-resident list
	5. Student projections	Budget - from D of E. Base list from elementary schools by end of Feb. (new entrants), directly from elem. principals, also out-of-county & separate schools. Geographic boundary - program variation recommended by princ. after registration (by end-Feb.) Occupation recommendation - processed by Rogers - none at Center Duff. - decision based on availability of space at Orangeville. Option sheets sent to elem. Mfg. of feeder principals to get Also pick-up info on migrants Registration also in early Sept. Info summarized for Board in connection with staffing (mfg. with Dir.) Some projections from Board
	6. Scheduling of exams	Exam schedule compatible with other high school.
	7. How many teachers can be hired given teacher-pupil ratio?	See 1A5

E-1

	DECISION	INFORMATION
	8. Ratio of Teachers to paraprofessionals	Some politics involved. Counts ½-teacher & must conform to fit ratio Salaries on ind. basis, discussed with Director Principals' perogative.
	9. Who should build timetables?	Teachers timetables submitted to Board for info - arranging visits, etc.
	10. Class load per teacher. 11. Class load for Dept. Heads. 12. Class load for Programme Supervisors. 13. Class load for Vice-Principals. 14. Class load for Chairman. 15. Class load for assistant Dept. Heads. 16. Class load for principal. 17. Autonomy of Dept. Head re assigning classes to teachers	
B. Timetables	1. Exams, timetable. 2. Student handbook 3. List on option sheets - what is its format 4. Pupil course requirements 5. What courses to offer (includes study of econ. feasibility)? 6. How many sections per course, includes study of econ. fees?	P-T ratio conformity (economics) May require Bd. or Ministry approval (admin. council) Family life/religion Originates from Dept. Head, on option sheet, decision to go ahead depends on response
C. Lockers	1. Method of locker distribution.	
D. Home Room	1. What Home Room system.	
E. Text Books	1. Method of Handling textbooks (distr.) 2. Method of handling textbooks (collection)	Textbooks - "caution fee", money to Board or book rental fee.

	DECISIONS	INFORMATION
2. PROGRAMME		
A. Budget	1. Budget requirements to be submitted.	Last year's budget & expenses; no projections for second half (Sept.-Dec.), Dept. heads est.; actual enrolments, transportation estimates. From acct - ceilings, mill-rate effect, projected income. Principals generally make decision based on advice from accts. Monthly expense sheets from Board (prepared by EDP)
	2. Best ratio of capital to supplies.	Capital = equipment (any item $50 which lasts more than 3 years) Ratio interval, total $ value important. Fixed (salaries, transportation, maintenance, plant operations, etc.) + capital/supplies - effect of latter on ceilings, grants.
	3. What recommendation to Sen. Admin. for renting/buying capital equipment.	
	4. Allocation of budget (to departments)	
	5. Review of budget spending	
	6. Should staff be aware of budget, planning, board policies, etc.?	
	7. Maintenance of facilities.	To supervisor of plant, industrial plant improvements Included in maintenance budget Informal request, perhaps memo, more often oral
B. Curriculum	1. Autonomy of Dept. Head re field trips	Field trip (Form) - copy to Board From Dept's budget (in supply budget)
	2. Changes in curriculum, modify outlines	
	3. Field trips	See 2B1
	4. Approval of courses, get from Ministry	Form from Director to Ministry
	5. Approval of textbooks, get from Ministry	Form from Director to Ministry

E-3

	DECISIONS	INFORMATION
C. Promotion	1. Should students be given a credit in lower level if unsuccessful at upper? 2. Should students be allowed to change/drop courses? 3. Promotion decisions.	Annual academic report: - promotion statistics - teacher development, certification inspection - athletics, extra-curricular
3. STAFF		
A. Hiring-Firing	1. Who should be fired?	Recommendation to Board. Consultation with superintendents.
	2. Who should be given a permanent contract?	As above.
	3. Hiring procedure.	Superintendent's report (from Dufferin official's contact with other Board)
	4. How many secretaries (based on board guidelines)?	Within guidelines (none) Recommendation to Board (Admin. Council)
	5. Salary of non-professional people.	See 3A1
B. Authority	1. How much autonomy do dept. Heads have in spending money? 2. How much autonomy to librarian. 3. How much say should Dept. Heads have in teacher selection. 4. Who should have keys to the school and what areas of the school. 5. How much authority delegated to head secretary.	
C. Duties	1. Duties of paraprofessionals.	
D. Promoting	1. Should all students write finals, who should write? 2. Pass final - gets credit? 3. Have promotion meetings. 4. What promotion policy. 5. Should there be exams? 6. How often should there be exams?	

E-4

	DECISIONS	INFORMATION
E. Professional Development	1. When should in-service training be done?	County budget (superintendents)
	2. What in-service training should take place?	School (Principal) - submitted for information.
	3. What special staff courses and for whom?	Request to superintendents (form)
	4. How should teachers be developed professionally?	(occasionally request from officials for teacher to attend conference)
	5. When should teachers visit other schools?	
	6. When should staff meetings be held on what subjects?	
	7. What committees should be appointed?	
	8. What supervision of teachers policy should be followed?	
F. Evaluation	1. Evaluations left to Dept. Heads?	Evaluation - reports (what, when) - forms
	2. Evaluation of staff.	Board guidelines (too extensive for secondaries)
		Secondary School to recommend evaluation guidelines
		Reports from prog. consultants (Form)
4. PARENTAL & EXTRA CURRICULAR STUDENT CONTROL + EXTRA CURRICULAR		
	1. Can time be taken off from class for extra curricular activities?	
	2. Number of school dances?	
	3. Principal - Student Council meeting.	
	4. Student smoking, where/when if any?	Board policy.
	5. Student behaviour, problems.	
	6. Activities/projects of Student Council.	Selling campaigns - discussed with Director
	7. What classes are each Vice-Principal responsible for, re discipline and attendance.	
	8. Classes for which principal is responsible for discipline/attendance.	
	9. Should attendance be compulsory for 16+?	Attendance violations to attend social social counsellor.
	10. Should attendance be compulsory for 18+	See above.

E-5

	DECISIONS	INFORMATION
4. PARENTAL & EXTRA CURRICULAR STUDENT CONTROL + EXTRA CURRICULAR		
	11. Participation in school athletics, yes or no in what sports.	
	12. Student assemblies.	
Parents Night	13. How many parents nights?	Parent-advisory committee - by Board.
	14. Use of facilities.	Board policy Requires school approval Requests from Board office, school approval Permit to caretakers
Comment	15. Commencement arrangements	
5. ONE SHOT DECISIONS		
	1. Should students be allowed to take employment before end of school?	
	2. Library open at nights?	
	3. What salary to request for principal?	
	4. Use of facilities.	
	5. Fire drills.	
	6. Normal busing procedures.	
	7. Change in procedure due to storms.	

E-6

PART TWO

SECONDARY PRINCIPALS' DECISIONS (STANDARDIZED) AND TIMING

CLASSIFICATION OF SECONDARY PRINCIPALS' DECISIONS

A. MAIN CATEGORIES

1. STUDENTS

1.1 Student progress/promotion/courses
1.2 Student Relations
1.3 Attendance
1.4 8-9 Transfer

2. INSTRUCTIONAL PROGRAM

2.1 Curriculum
2.2 Budget
2.3 Exams/Promotions
2.4 Non-regular events, library

3. STAFF

3.1 Hire/Terminate/Promote (Regular)
3.2 Hire/Terminate/Promote (Non-professional)
3.3 Professional Development
3.4 Allocation of Staff
3.5 Staff Relations

4. COMMUNITY RELATIONS

4.1 Relations with Parents
4.2 Use of Facilities

5. PLANT

5.1 Plant

6. TRANSPORTATION

6.1 Transportation

B. SUB-CATEGORIES

1. STUDENTS

1.1 Student Progress/Promotion/Courses

D1,1,1 - Exams, Timetable

D1,1,2 - Should students be allowed to take employment before end of school

D1,1,3 - Should students be given a credit in lower level if unsuccessful at upper

D1,1,4 - Should students be allowed to change/drop courses

D1,1,5 - Promotion decisions

1.2 Student Relations

D1,2,1 - Commencement arrangements (A)

D1,2,2 - Method of handling textbooks (distribution)

D1,2,3 - Student handbook

D1,2,4 - Commencement - when (Mc)

D1,2,5 - Commencement - format (Mc)

D1,2,6 - What home room system

D1,2,7 - Number of school dances

D1,2,8 - Method of handling textbooks (collection)

D1,2,9 - Procedures for school visitors

D1,2,10 - Principal - Student Council meeting

D1,2,11 - Student smoking, where/when if any

D1,2,12 - Method of locker distribution

D1,2,13 - Student behaviour, problems

D1,2,14 - Activities/Projects of Student Council

1.3 Attendance

D1,3,1 - Should attendance be compulsory for 16+

D1,3,2 - Should attendance be compulsory for 18+

D1,3,3 - Cancellation of classes due to teacher absence

D1,3,4 - Should free time for students be encouraged

1.4 8-9 Transfer

D1,4,1 - Planning 8-9 integration

2. INSTRUCTIONAL PROGRAM

2.1 Curriculum

D2,1,1 - Participation in school athletics, yes or no in what sports?

D2,1,2 - Projects for County done in school shops

D2,1,3 - List on option sheets - what is its format

D2,1,4 - Pupil course requirements

D2,1,5 - What courses to offer, includes study of econ. fees?

D2,1,7 - How many sections per course, includes study of econ. fees?

D2,1,8 - What rooms to each course?(note special requirements)

D2,1,9 - Assign subjects to areas of study

D2,1,10 - How much autonomy to give department heads?

D2,1,11 - How long should periods be?

D2,1,12 - Use bells in schools?

D2,1,13 - Changes in curriculum, modify outlines

D2,1,14 - Should summer school be encouraged?

D2,1,15 - Student assemblies

D2,1,16 - Field trips

D2,1,17 - Approval of courses, get from Ministry

D2,1,18 - Approval of textbooks, get from Ministry

2.2 Budget

D2,2,1 - Budget requirements to be submitted

D2,2,2 - Best ratio of capital to supplies

D2,2,3 - Where should how much computer assistance be purchased?

D2,2,4 - What recommendation to Sen. Admin. for renting/buying capital equipment?

D2,2,5 - Allocation of budget (to departments)

D2,2,6 - How much autonomy do department heads have in spending money?

D2,2,7 - Review of budget spending

2.3 Exams/Promotions

D2,3,1 - Evaluations left to department heads?

D2,3,2 - Should all students write finals, who should write?

D2,3,3 - pass final - gets credit?

D2,3,4 - Have promotion meetings?

D2,3,5 - What promotion policy?

D2,3,6 - Should there be exams?

D2,3,7 - How often should there be exams?

D2,3,8 - Scheduling of exams?

2.4 Non-Regular Events/Library

D2,4,1 - Library open at nights?

D2,4,2 - How much autonomy to librarian?

D2,4,3 - Can time be taken off from class for extra curricular activities?

3. STAFF

3.1 Hire/Terminate/Promote (Regular)

D3,1,1 - Student projections

D3,1,2 - Evaluation of staff

D3,1,3 - How much say should department heads have in teacher selection?

D3,1,4 - How many teachers can be hired given teacher/pupil ratio?

D3,1,5 - What salary to request for principal?

D3,1,6 - Who should be fired?

D3,1,7 - Who should be given a permanent contract?

D3,1,8 - Hiring procedure

3.2 Hire/Terminate/Promote (Non-Professional)

D3,2,1 - Ratio of teachers to paraprofessionals

D3,2,2 - How many secretaries (based on board guidelines)?

D3,2,3 - Salaries of non-professional people

3.3 Professional Development

D3,3,1 - When should inservice training be done?

D3,3,2 - What inservice training should take place?

D3,3,3 - What special staff courses and for whom?

D3,3,4 - How should teachers be developed professionally?

D3,3,5 - When should teachers visit other schools?

3.4 Allocation of Staff

D3,4,1 - Who should build timetables?

D3,4,2 - Class load per teacher

D3,4,3 - Class load for department heads

D3,4,4 - Class load for programme supervisors

D3,4,5 - Class load for Vice-Principals

D3,4,6 - Class load for Chairman

D3,4,7 - Class load for assistant department heads

D3,4,8 - Class load for Principal

D3,4,9 - How much autonomy for Librarian?

D3,4,10 - Duties of paraprofessionals

D3,4,11 - What classes are each V.P. responsible for, re discipline and attendance?

D3,4,12 - Classes for which principal is responsible for discipline/attendance

D3,4,13 - Autonomy of department head re assigning classes to teachers

D3,4,14 - Autonomy of department head in curriculum

D3,4,15 - Autonomy of department head re field trips

D3,4,16 - Authorize who can use P.A.

D3,4,17 - How much authority delegated to head secretary.

3.5 Staff Relations

D3,5,1 - What supervision of teachers policy should be followed?

D3,5,2 - School open 12 months or not?

D3,5,3 - Who should have keys to the school and what areas of the school?

D3,5,4 - When should staff meetings be held on what subjects?

D3,5,5 - What committees should be appointed?

D3,5,6 - Should staff be aware of budget, planning, board policies, etc.?

4. COMMUNITY RELATIONS

4.1 Relations with Parents

D4,1,1 - How many parents nights?

D4,1,2 - Method of reporting to parents

D4,1,3 - Existence of a dress code for teachers

4.2 Use of Facilities

D4,2,1 - Use of Facilities

5. PLANT

5.1 Plant

D5,1,1 - Maintenance of facilities

D5,1,2 - Authorization of when facilities (e.g., P.A.) can be used

D5,1,3 - Fire drills

6. TRANSPORTATION

6.1 Transportation

D6,1,1 - Normal busing procedures

D6,1,2 - Change in procedure due to storms

C. TIMING OF SECONDARY PRINCIPALS' DECISIONS

1. STUDENTS

1.1 Student, Progress/Promotion/Courses

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1				X			X		X			
D1,1,2								X				
D1,1,3										X		
D1,1,4										X		
D1,1,5										X		

1.2 Student Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,1	X											
D1,2,2	X											
D1,2,3								X				
D1,2,4								X				
D1,2.5								X				
D1,2,6								X	X			
D1,2,7									X			
D1,2,8										X		
D1,2,9										X		
D1,2,10										X		
D1,2,11										X		
D1,2,12										X		
D1,2,13	X	X	X	X	X	X	X	X	X	X	ANA	ANA
D1,2,14	X	X	X	X	X	X	X	X	X	X	ANA	ANA

1.3 Attendance

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,3,1										X		
D1,3,2										X		
D1,3,3										X		
D1,3,4	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont	X cont		

1.4 8-9 Transfer

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,4,1	X								X	X	X	X

2. INSTRUCTIONAL PROGRAM

2.1 Instructional Programme, Curriculum

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X							X				
D2,1,2	X											
D2,1,3		X	X									
D2,1,4					X							
D2,1,5					X							
D2,1,6						X						
D2,1,7						X						
D2,1,8							X					
D2,1,9								X				
D2,1,10								X				
D2,1,11								X				
D2,1,12								X				
D2,1,13										X		
D2,1,14										X		
D2,1,15	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA			
D2,1,16	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,17	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D2,1,18	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

2.2 Budget

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1		X	X									
D2,2,2		X	X									
D2,2,3		X	X									
D2,2,4		X	X									
D2,2,5				X	X	X	X	X	X	X		
D2,2,6									X	X		
D2,2,7	X	X	X	X	X	X	X	X	X	X	X	X

2.3 Exams/Promotions

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,3,1	X											
D2,3,2		X	X									
D2,3,3		X	X									
D2,3,4								X	X			
D2,3,5								X	X			
D2,3,6										X		
D2,3,7										ANA		
D2,3,8										ANA		

2.4 Non-Regular Events, Library

	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,4,1	X											
D2,4,2								X	X			
D2,4,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3. STAFF

3.1 Hire/Terminate/Promote (Regular)

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1										X		
D3,1,2							X					
D3,1,3							X					
D3,1,4							X					
D3,1,5							X					
D3,1,6								X				
D3,1,7								X				
D3,1,8									X	X	X	

3.2 Hire/Terminate/Promote (Non-professional)

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1						X						
D3,2,2										X		
D3,2,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.3 Professional Development

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,3,1										X		
D3,3,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,3,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

3.4 Allocation of Staff

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,4,1		X	X									
D3,4,2						X						
D3,4,3						X						
D3,4,4						X						
D3,4,5						X						
D3,4,6						X						
D3,4,7						X						
D3,4,8						X						
D3,4,9								X				
D3,4,10								X				
D3,4,11										X		
D3,4,12										X		
D3,4,13										X		
D3,4,14										X		
D3,4,15										X		
D3,4,16										X		
D3,4,17										X		

3.5 Staff Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,5,1										X		
D3,5,2										X		
D3,5,3										X		
D3,5,4	X	X	X	X	X	X	X	X	X	X		
D3,5,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		
D3,5,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

4. COMMUNITY RELATIONS

4.1 Relations with Parents

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1	X											
D4,1,2									X	X		
D4,1,3										X		

4.2 Facility Use

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

5. PLANT

5.1 Plant

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1						X						
D5,1,2										X		
D5,1,3	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA		

6. TRANSPORTATION

6.1 Transportation

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D6,1,1	X											
D6,1,2				X	X	X	X					

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FINAL REPORT

INFORMATION ANALYSIS FOR SCHOOL BOARD PLANNING AND MANAGEMENT: DUFFERIN BOARD OF EDUCATION

Volume III: Technical Appendices - Central Board Level

Susan Padro

March, 1977

Department of Educational Planning

THE ONTARIO INSTITUTE FOR STUDIES IN EDUCATION

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ED 063 168
Vol. III

TABLE OF CONTENTS

Volume III: Technical Appendices - Central Board Level

APPENDIX F LIST OF BOARD FUNCTIONS

APPENDIX G INDIVIDUAL DECISION FUNCTIONS

APPENDIX H AMALGAMATED DECISION FUNCTIONS

PART ONE: DECISIONS BY CLASSIFICATION SCHEME

PART TWO: DECISIONS BY BOARD FUNCTIONS

APPENDIX I TIMING OF DECISION FUNCTIONS - BY CLASSIFICATION SCHEME

APPENDIX J DECISION FLOWCHARTS

APPENDIX K INFORMATION NEEDS FOR DECISIONS - BY BOARD FUNCTIONS

APPENDIX F

LIST OF BOARD FUNCTIONS

THE DUFFERIN COUNTY BOARD OF EDUCATION

THE OPERATION OF THE BOARD BY FUNCTION

1. FUNCTION: ORGANIZATIONAL PLANNING

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. Developing a Planning Model for School Board Responsibilities.
2. Develop a Model of Educational Planning.

2. FUNCTION: ORGANIZATION - EXECUTIVE LEVEL

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board

RESPONSIBILITIES:

1. Structures and Procedures of the Board.
2. Structure of the Administration.
3. Defining the Organization.
4. Committee Organization.

3. FUNCTION: SCHOOL BOARD - ADMINISTRATIVE RELATIONSHIPS

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. Interaction among the School Board, the School System and the Community.
2. Functions of the School Board and the School System.
3. Board-Administration Relationships.
4. Evaluation.

4. FUNCTION: PERSONNEL

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. Determine the System's Personnel Needs.

2. Recruitment, Selection and Promotion.

3. Supervisory Practices.

4. Maintaining and Improving Abilities of Personnel.

5. Evaluating Personnel.

5. FUNCTION: EXTERNAL RELATIONS

Supervisor: Director of Education.
Responsible to: Executive Committee of the Board.

RESPONSIBILITIES:

1. To develop a systematic approach to external relations so that the positive influences from both inside and outside the system can be utilized in the development of purposes and objectives of the school programs.

2. To convey decisions of the Board and the staff in an effective manner to concerned groups and organizations in the community.

3. To attempt to obtain positive community support in all areas necessary for a successful school program from such interest groups as: parents, ratepayers, religious organizations, labour groups, Ministry of Education Officials, local municipal officials, universities, teacher organizations, trustee organizations, business and industrial organizations, student organizations.

4. To be aware of the nature of external influences and the mechanisms for controlling them to the benefit of the school programs.

5. To make Board Members, Officials, and all staff aware of their responsibilities in this area.

6. FUNCTION: PLANT PLANNING DEVELOPMENT

Supervisor: Executive Assistant to the Director.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. An ongoing analysis of the projected needs of the educational community for new buildings and facilities.
2. Consideration of community needs and co-operating, where practical, with the community on the inclusion of these needs.
3. Consideration of transportation needs and pupil walking distances.
4. Planning Plant Development Projects.
5. Plant Design, Construction and Alterations.
6. Educational Program Requirements.
7. Recommendation for Architect Selection, Plans and Specifications.
8. Site Acquisition.
9. Tendering.
10. Project Supervision and Control.

7. FUNCTION: PLANT MANAGEMENT

Supervisor: Executive Assistant to the Director.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Establishment of Objectives and Policies for Plant Management.
2. Custodial Services.
3. Janitorial Services.
4. Maintenance Services.

8. FUNCTION: LIAISON

Supervisor: Executive Assistant to the Director.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Municipalities.
2. Bussing.
3. Interjurisdictional Pupils.

9. FUNCTION: INSTRUCTIONAL MEDIA DEVELOPMENT

Supervisor: Executive Assistant to the Director.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Develop a library of films, filmstrips, tapes and professional books in consultation with the teaching staff of the Board.

2. Keep the staff informed of current trends in the audio-visual field.

3. Be available for consultation on matters referring to instructional media.

4. Maintain a system of distribution for instructional media.

10. FUNCTION: ORGANIZATION - SCHOOL LEVEL

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To organize the operation of the schools, K-13, Special Education Classes, and classes for the trainable retarded consistent with the philosophy of the aims and objectives of the Board and resolutions of the Board now in effect.

11. FUNCTION: SUPERVISION AND EVALUATION

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To provide for the supervision and evaluation of the teachers and principals of the County.

2. To provide for the supervision and evaluation of the curriculum and programs used in the schools of the County.

12. FUNCTION: EDUCATIONAL PLANNING

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To facilitate planning at all levels for developing educational programs, setting priorities, implementing and evaluating educational programs and using financial resources in the most rational manner.

2. To organize the system so that it will be sufficiently stable to allow for orderly and rational planning and decision making, and sufficiently stable to prevent strong barriers to growth and change.

13. FUNCTION: ACADEMIC BUDGET PROCESS

Supervisor: Superintendent of Academic Affairs.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Compilation of Academic Budget.

2. Control and Monitoring of Academic Budget.

14. FUNCTION: FINANCE

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Establish Objectives and Policies for Financial Management.

2. Long-Term Financing and Debt Management.

3. Accounting Systems.

4. Administrative Reporting.

5. Insurance Management.

6. Auditing.

7. Fixed Assets.

15. FUNCTION: TRANSPORTATION MANAGEMENT

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Objectives and Standards.

2. Route Planning.

3. Operations.

4. Bus Maintenance.

16. FUNCTION: DATA PROCESSING

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. To make a continuing analysis of the Board's requirements.
2. Review at regular intervals the existing systems for data processing and recording to determine their current effectiveness in meeting the Board's requirements.
3. Improving Present Data Systems.
4. Evaluation of Computer Feasibility.

17. FUNCTION: PURCHASING AND STORES

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Purchasing and Policy Standards.
2. Initiating and Validating Purchase Requisitions.
3. Supplier Selection.
4. Securing Quotations.
5. Issuing Orders.
6. Expediting.
7. Receiving and Verification for Payment.
8. Stores Control and Administration.
9. Purchasing and Stores Reports.

18. FUNCTION: BUDGETING AND ACCOUNTING CONTROL OF BUDGET

Supervisor: Controller of Finance.
Responsible to: Director of Education.

RESPONSIBILITIES:

1. Obtain Estimates of Revenue.
2. Prepare Tentative Operating Budget for Approval.
3. Review regularly all current or proposed projects on capital budgets.
4. Report at regular intervals revenues and expenses.

APPENDIX G

INDIVIDUAL DECISION FUNCTIONS

NAME: W. Scott Roliff [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R01	Allocation of Director's time: a) Organization of time to various responsibilities - what can be delegated - to whom b) Priorities on personal time	Continual	All	(1) Organizational Planning
R02	Interpretation of - Board policy - needs and wants of personnel; how to handle	continual	All	(2) Organizational-Executive Level
R03	Budget preparation - regular needs - special needs and projects	yearly	Oct-Feb	(3) Administrative Relationships
	- how much total budget can mill rate stand politically	yearly	Oct	
	- how much total budget can ceiling stand	yearly	Oct	
R04	How should budget be distributed among schools	yearly	Feb	(3) Administrative Relationships
R05	Budget control			
	- day school regular	monthly	All	(3) Administrative Relationships
	- conferences, courses during year	monthly	All	
	- What summer courses for teachers should be subsidized by the Board?	yearly	Nov	

NAME: W. Scott Roliff [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R06	Teacher salary negotiations			(4) Personnel
R07	Striking County pupil/teacher ratio: - secondary - elementary - allotting number of teachers to i) two secondary schools ii) elementary schools	yearly	March	(3) Administrative Relationships
R08	Assessment of Secondary Principals	?	Jan and June	(4) Personnel
R10	Organizational changes:			(3) Administrative Relationships
	a) Review and changes of job descriptions to accommodate organizational changes	1	Jan	
	b) Review of administration organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency	1	Oct-Jan	
	c) Review of academic organizational structure and its operation to make changes necessary for optimum effectiveness and efficiency	1	Oct-Jan	
R11	Staff morale and welfare problems	Continual	All	(4) Personnel

NAME: W. Scott Rolliff [R]

TITLE: Director of Education and Secretary-Treasurer

Number	Decision	Frequency	Time of Year	Board Function
R13	Justification of spending	Continual	All	(5) External Relations
R14	Leaves of absence	as necessary	All	(4) Personnel
R15	Board Office accommodation	Once	August	(1) Organizational Planning
R16	Items to be referred to Board's solicitor	as necessary	All	(3) Administrative Relationships
R17	Information to federations, press and public	Monthly	All	(3) Administrative Relationships
R18	Deciding whether items should be referred to Board or handled by the Administration	as necessary	All	(3) Administrative Relationships
R19.1	Agenda items: Board/Executive			
	a) Officials meetings	10	All	(3) Administrative Relationships
	b) Administrative Council	10	All - summer recess	
	c) Executive Committee	10	All	
	d) Board	10	All	
	e) Principals' meetings	10	All - July recess	
	f) Board Committees	10	All - July recess	
R19.2	Agenda Items: Management Committee			
R20/S10	Assessment of Competency of experienced Teacher Applicants	20	Feb.-May	(10) Organization - School Level
R21/M04	Determination of items for inclusion in monthly financial reports to boards		Monthly	(14) Finance

NAME: Murray R. Young [M]

TITLE: Executive Assistant to the Director

Number	Decision	Frequency	Time of Year	Board Function
M01	Reporting - accommodation, maintenance	Monthly continual	All	(6) Plant Planning and Development
M02	Adult Education: - selection of principals - what guidelines are necessary - what fees will be charged (with RB) - what lengths of courses - what supplies and facilities may be used	1	June	(8) Liason
M03	Summer School: a) Should Summer School be - operated locally - purchased (secondary)	1	May	(8) Liason
	b) What fees, if any, should be charged (with RB)	1	May	
M04	Determination of recommendations regarding salary proposals for non-teaching staff (caretakers & office personnel)	annual	Oct-Dec	(7) Plant Management
M05	Staff requirements for special projects such as S.O.L.E. - quantity - quality - salary - condition of employment i) responsibility	6	May-June	(8) Liason

NAME: Murray R. Young [M]

TITLE: Executive Assistant to the Director

Number	Decision	Frequency	Time of Year	Board Function
M06/B01	Answers to public regarding requests for changes in operation of the transportation system.	as necessary		(15) Transportation Management
M07/B03	Determination of recommendations regarding capital construction forecasts.	annual	September	(6) Plant planning and development
M08	Personnel's use of resources:			
	a) How should a continuing catalogue system for the materials be developed	1	August	(9) Instructional Media Development
	b) How should personnel be - advised of available resources - encouraged to use resources - assisted in use of resources	continuing	All	
M09	Problems referred by Plant Supervisor, Special Education and other superintendents.	as necessary		(7) Plant Management
M10/S08	Necessary changes in attendance areas	once per year	March	(11) Supervision and Evaluation
M11/B05	Determination of information required at various stages regarding applications for building approvals	as necessary		(14) Finance
M12	Accommodation requirements for schools - building proposals	1	Jan-Feb	(6) Plant planning & Development

NAME: Stanley Robinson [S]

TITLE: Superintendent of Academic Affairs

Number	Decision	Frequency	Time of Year	Board Function
S01	Staffing of elementary schools	as necessary	April-Sept.	(10) Organization - School Level
S02	Evaluation of Teachers (Probationary)	as necessary	Sept-June	(11) Supervision and Evaluation
S03	Evaluation of Principals (Elementary)	Formerly once per year (on going)	April	(11) Supervision and Evaluation
S04	Curriculum Development	once to four times per year	Spring	(12) Educational Planning
S05	Teacher hiring	as necessary	Mainly spring	(10) Organization - School Level
S06	Promotions of elementary teachers	as necessary	Spring	(11) Supervision and Evaluatic
S07	Agenda items - Education Committee	ten times per year	Both meet Sept.	(11) " " "
	- Education Council (sub-committee of education committee)	five times per year	to June monthly	
S08/M10	Necessary changes in attendance areas	once per year	March	(11) Supervision and Evaluatic
S09	Resource material utilization/ involvement: a) What are the best ways of using resource materials by - oneself - other teachers - participants b) How can involvement in professional development programs be encouraged	Continuing	All	(9) Instructional media development
S10/R20	Competency of experienced teacher applicants following consultation with a superintendent of another board for recommendation	20	Feb-May	(10) Organization - School Level

NAME: Stanley Robinson [S]

TITLE: Superintendent of Academic Affairs

Number	Decision	Frequency	Time of Year	Board Function
S11	Planning of Professional Development Programs	2	August January	(11) Supervision and Evaluation
S12	Resources for Professional Development Programs	Continuing	All	(11) " " "
S13	How to keep teachers updated in current trends,. concepts and practices (information dissemination on P.D.)	Continuing	All	(11) " " "
S14	Performance Criteria for principals/ Vice-Principals			
	a) What is the performance criteria for appraising - principals - vice-principals	1	March	
	b) How do each of the above personnel meet the criteria	6	April	
S15	Program Modification	Ongoing	May/June	(12) Educational Planning
S16	Assessment of Academic Program	Ongoing	Dec. (Gr.8) May/June (Gr.3&6)	(12) Educational Planning
S17	Elementary School Budget	1	Oct. - Jan.	(13) Academic Budget Process
S18	Secondary School Budget	1	" "	(13) " " "
S19	Total Academic Budget	1	Jan. (to Board) Feb. (revised)	(13) " " "
S20/R04	Budget Distribution among Schools	yearly		(3) Admin. Relations

NAME: F.R. Brand [B]

TITLE: Controller of Finance

Number	Decision	Frequency	Time of Year	Board Function
B01/M06	Answers to public regarding requests for changes in operation of the transportation system.	as necessary	-	(15) Transportation Management
B02/R21	Determination of items for inclusion in monthly financial reports to Board.	monthly		(14) Finance
B03/M07	Determination of recommendations regarding capital construction forecasts.	annual	September	(14) Finance
B04	Determination and review of suppliers and specifications for purchase of standard supplies and payments.	monthly	-	(17) Purchasing and Stores
B05/M11	Determination of information required at various stages regarding applications for building approvals.	as necessary	-	(14) Finance
B06	Answers to public to requests for information regarding school areas, bus routing, accident insurance claim problems, sale of school building, etc.	as necessary	-	(14) Finance
B07	Consideration of cost of operation of schools and resultant decisions concerning what should be done about problem indicated - monthly report inclusion if necessary.	monthly	April-December	(18) Budgeting and Budgetary Control
B08	Evaluation of non-teaching employees	annual	Sept-Dec	(14) Finance

NAME: F.R. Brand [B]

TITLE: Controller of Finance

Number	Decision	Frequency	Time of Year	Board Function
B09	Determination of local levies for education.	annual	February	(18) Budgeting and Budgetary Control
B10	Determination of transportation arrangements with bus operators - routing, loading, payment.	annual	October	(15) Transportation Management
B11	Budget Compilation	annual		(18) Budgeting and Budgetary Control

APPENDIX H

AMALGAMATED DECISION FUNCTIONS

PART ONE: DECISIONS BY CL SSIFICATION SCHEME

PART TWO: DECISIONS BY BOARD FUNCTIONS

PART ONE

DECISIONS BY CLASSIFICATION SCHEME

CLASSIFICATION OF CENTRAL OFFICE DECISIONS

A. MAIN CATEGORIES

1. INSTRUCTIONAL PROGRAM

1.1 Budget
1.2 Academic Program

2. STAFFING PROGRAM

2.1 Staff Relations
2.2 Hiring
2.3 Professional Development
2.4 Salary
2.5 Organization

3. RELATIONS (Board/Community)

3.1 Board
3.2 Community

4. TRANSPORTATION

4.1 Transportation

5. PLANT

5.1 Problems Arising
5.2 Accommodation

B. SUB-CATEGORIES

1. INSTRUCTIONAL PROGRAM

1.1 Budget

D1,1,1 - Budget Preparation (R03, S17, S18)

D1,1,2 - Budget Distribution among schools (R04, S19, S20)

D1,1,3 - Budget Control (R05, B07)

D1,1,4 - Determination and review of suppliers and specifications for purchase of standard supplies (B04)

D1,1,5 - Determination of local levies for education (B09)

1.2 Academic Program

D1,2,2 - Curriculum Development (S04)

D1,2,4 - Summer School (M03)

D1,2,5 - Adult Education (M02)

D1,2,6 - Assessment of Academic Program (S16)

D1,2,7 - Program Modification (S15)

2. STAFFING PROGRAM

2.1 Staff Relations

D2,1,2 - Evaluation of non-teaching employees (B08)

D2,1,3 - Evaluation of Teachers (Probationary) (S02)

D2,1,4 - Assessment of Secondary Principals (R08)

D2,1,5 - Evaluation of Elementary Principals (S03, S14)

D2,1,6 - Promotion of Elementary Teachers (S06)

D2,1,7 - Co-ordination and Supervision of Professional Development (S11.4)

D2,1,10 - Leaves of Absence (R14)

D2,1,11 - Allocation of Director's Time (R01)

2.2 Hiring

D2,2,1 - Teacher Hiring (S05)

D2,2,2 - Staffing of Special Projects (M05)

D2,2,3 - Staffing of Elementary Schools (S01)

D2,2,4 - Assessment of Competency of Experienced Teacher Applicants (S10/R20)

2.3 Professional Development

D2,3,1 - Objectives for Professional Development Program (S11.2)

D2,3,4 - Planning of Professional Development Program (S11.1)

D2,3,5 - Resources for Professional Development Program (S12)

D2,3,6 - Personnel's Use of Resources (M08)

D2,3,7 - Information Dissemination on Professional Development
- Distribution of Information on P.D. to Teachers (S13.1)
- Information Distribution on Innovative Techniques to Teachers (S13.2)

D2,3,9 - Resource Material Utilization/Involvement (S09)
Encourage Development of Resources (S09)

D2,3,10 - Distribution of Professional Development Overload (S11.5)

D2,3,11 - Encourage Innovation by Teachers (S13.3)

D2,3,12 - Evaluation System for Professional Development Program (S11.3)

2.4 Salary

D2,4,1 - Salary Negotiations, Non-teaching Staff (M04)

D2,4,2 - Teachers Salary Negotiations (R06)

2.5 Organization

D2,5,1 - Organizational Changes (R10)

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

D3,1,1 - Determination of Method of Budget Presentation (R03/B11)

D3,1,2 - Agenda Items/Board Reports
(a) Board/Executive (R19.1)
(b) Education Committee (S07)
(c) Accommodation/Maintenance (M01)
(d) Management Committee (R19.2)

D3,1,3 - Monthly Financial Reports to Board (B02, R21)

D3,1,4 - Interpretation of Board Policy - Staff Morale & Welfare Policies (R02,R11)

D3,1,5 - Items Referred to Board or Administration? (R18)

D3,1,6 - Items Referred to Board Solicitor (R16)

3.2 Community

D3,2,1 - Justification of Spending (R13)

D3,2,2 - Answers to Public Re School Areas, Bus Routes, etc. (B01,B06,M06)

D3,2,3 - Information to Federations, Press & Public (R17)

4. TRANSPORTATION

4.1 Transportation

D4,1,1 - Determination of Transportation Arrangements with Bus Operators (Routing, Loading, Payment) (B10)

5. PLANT

5.1 Problems Arising

D5,1,1 - Problems Referred by Plant Supervisor, Special Education & Other Superintendents (M09)

5.2 Accommodation

D5,2,1 - Recommendation re Capital Construction Forecast (M07,B03)

D5,2,2 - Necessary Changes in Attendance Area (S08, M10)

D5,2,3 - Accommodation Requirements for Schools (Building Proposals) (M12)

D5,2,4 - Board Office Accommodation (R15)

D5,2,5 - Determination of Information Required at Various Stages Regarding Applicants for Building Approvals (B05, M11)

D5,2,6 - Striking County Pupil/Teacher Ratio (R07)

PART TWO

DECISIONS BY BOARD FUNCTIONS

BOARD FUNCTION		INDIVIDUAL DECISIONS	
(1)	Organizational Planning	R01	Allocation of Director's Time
		R15	Board Office Accommodation
(2)	Organization - Executive Level	R02	Interpretation of - Board policy - needs and wants of personnel, how to handle
(3)	Administrative Relationships	R03	Budget Preparation
		R04	How Should Budget be Distributed among Schools
		R07	Striking County Pupil/Teacher Ratio
		R10	Organizational Changes
		R16	Items to be Referred to Board's Solicitor
		R17	Information to Federations, Press and Public
		R18	Deciding Whether Items Should be Referred to Board of Handled by the Administration
		R19	Agenda Items: Board/Executive
		R05	Budget Control
(4)	Personnel	R06	Teacher Salary Negotiations
		R08	Assessment of Secondary Principals
		R11	Staff Morale and Welfare Problems
		R14	Leaves of Absence
(5)	External Relations	R13	Justification of Spending
(6)	Plant Planning & Development	M01	Reporting - Accommodation - Maintenance
		M07/B03	Determination of Recommendations re Capital Construction Forecasts
		M12	Accommodation Requirements for Schools - Building Proposals
(7)	Plant Management	M04	Determination of Recommendations Regarding salary Proposals for Non-Teaching Staff (Caretakers & Office Personnel)
			Development of Maintenance Budget
			Monitoring, controling maintenance budget allocations
		M09	Problems Referred by Plant Supervisor, Special Ed. and other Superintendents

BOARD FUNCTION	INDIVIDUAL DECISIONS	
(8) Liaison	M02	Adult Education
	M03	Summer School
	M05	Staff requirements for Special projects such as S.O.L.E.
(9) Instructional Media & Development	M08	Personnel's Use of Resources
	S09	Resource Material Utilization/ Involvement
(10) Organization - School Level	R20/S10	Assessment of Competency of Experienced Teacher Applicants
	S01	Staffing of Elementary Schools
	S05	Teacher Hiring
(11) Supervision and Evaluation	S02	Evaluation of Teachers (Probationary)
	S03	Evaluation of Principals (Elementary)
	S06	Promotions of Elementary Teachers
	S07	Agenda Items - Education Committee
	S08/M10	Necessary Changes in Attendance Areas
	S11.1-S11.5	Planning of Professional Development Programs
	S12	Resources for Professional Development Programs
	S13.1-S13.3	How to Keep Teachers Updated on Current Trends, Concepts and Practices (P.D. Information Dissemination)
	S14	Performance Criteria for Principals/ Vice-Principals
(12) Educational Planning	S04	Curriculum Development
	S15=ITM9	Program Modification
	S16	Assessment of Academic Program
(13) Academic Budget Process	S17	Elementary School Budget
	S18	Secondary School Budget
	S19	Total Academic Budget
(14) Finance	B02/R21	Determination of Items for Inclusion in Monthly Financial Reports to Board
	B03/M07	Determination of Recommendations regarding Capital Construction Forecasts
	B05/M11	Determination of information required, Building Approvals
	B06	Answers to Public in answer to Requests, School Users, Bus Routing
	B08	Evaluation of Non-Teaching Employees

BOARD FUNCTION	INDIVIDUAL DECISIONS	
(15) Transportation Management	B01/M06	Answers to Public Regarding Requests for Changes in Operation of the Transportation System
	B10	Determination of Transportation Arrangements with Bus Operators-Routing, Loading, Payment
(16) Data Processing	---	
(17) Purchasing and Stores	B04	Determination and Review of Suppliers and specifications for Purchase of Standard Supplies and Payments
(18) Budgeting and Budgetary Control	B07	Consideration of Cost of Operation of Schools and Resultant Decisions Concerning What Should be Done, Monthly Report
	B09	Determination of Local Levies for Education
	B11	Budget Compilation

APPENDIX I

TIMING OF DECISIONS FUNCTIONS - BY CLASSIFICATION SCHEME

TIMING OF CENTRAL OFFICE DECISIONS

1. INSTRUCTIONAL PROGRAM

1.1 Budget

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,1,1		X				X						
D1,1,2						X						
D1,1,3	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,4	X	X	X	X	X	X	X	X	X	X	X	X
D1,1,5						X						

1.2 Academic Program

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D1,2,2						X	X	X	X	X	X	X
D1,2,4									X			
D1,2,5										X		
D1,2,6											X	

2. STAFFING PROGRAM

2.1 Staff Relations

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,1,1	X											X
D2,1,2	X	X	X	X								
D2,1,3	X	X	X	X	X	X	X	X	X	X		
D2,1,4										X		
D2,1,5								X				
D2,1,6								X				
D2,1,7	X	X	X	X	X	X	X	X	X	X	X	X
D2,1,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,1,11												

2.2 Hiring

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,2,1	X							X	X	X	X	X
D2,2,2									X	X		
D2,2,3	X	ANA	ANA	ANA	ANA	ANA	ANA	X	X	X	X	X
D2,2,4						X	X					

2.3 Professional Development

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,3,1				X						X		
D2,3,3										X	X	
D2,3,4	X	X	X	X	X	X	X	X	X	X	X	X
D2,3,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,7	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,9	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,10	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,11	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D2,3,1?	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

2.4 Salary

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,4,1		X	X	X								
D2,4,2					X							

2.5 Organization

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D2,5,1		X	X	X	X	X	X	X	X	X		

3. RELATIONS (BOARD/COMMUNITY)

3.1 Board

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,1,1						X						
D3,1,2	X	X	X	X	X	X	X	X	X	X	XX	X
D3,1,3	X	X	X	X	X	X	X	XX	X	X	X	X
D3,1,4	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,1,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,1,6	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

3.2 Community

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D3,2,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,2,2	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D3,2,3												

4. TRANSPORTATION

4.1 Transportation

	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D4,1,1		X										

5. PLANT

5.1 Problems Arising

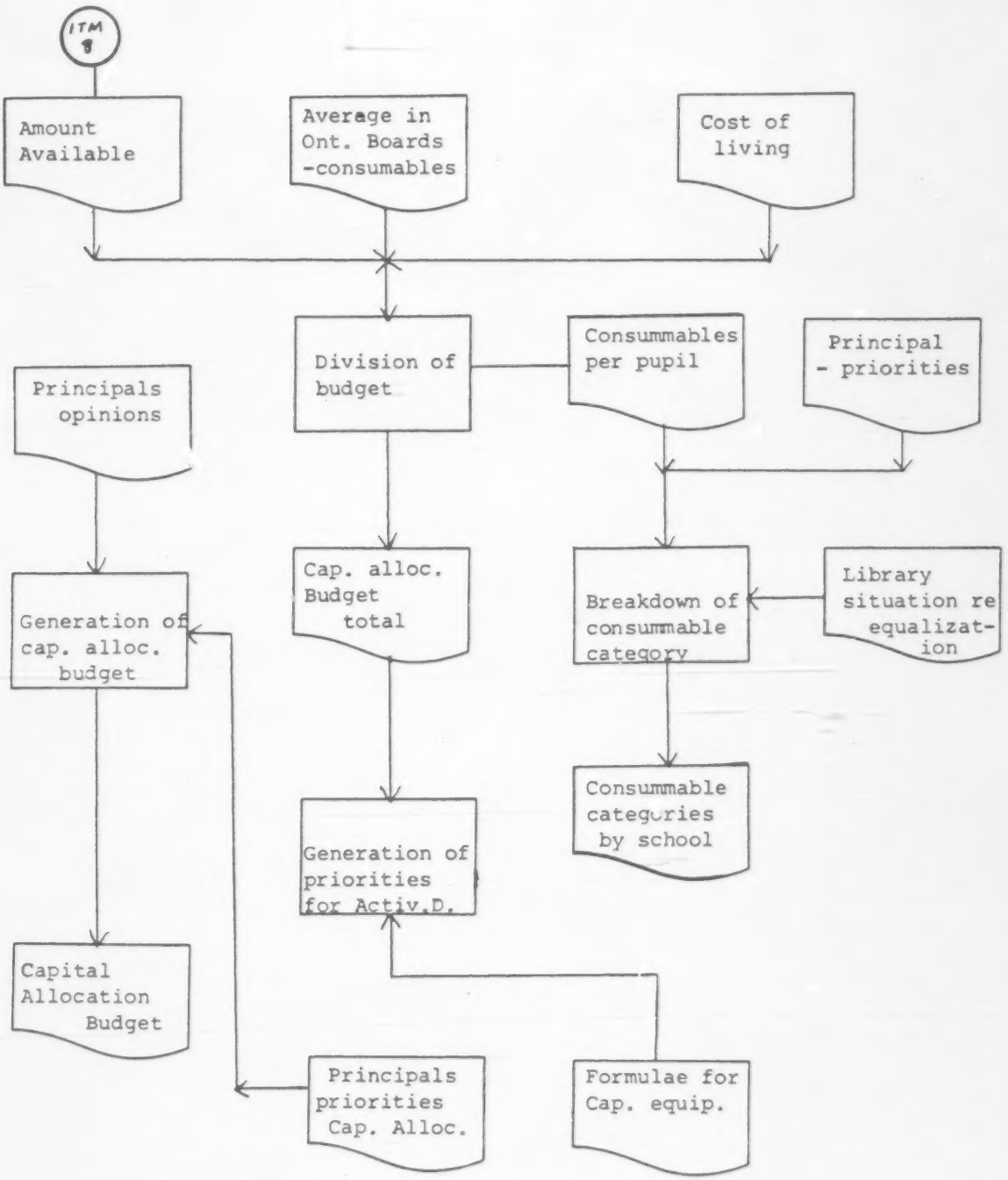
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,1,1	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA

5.2 Accommodation

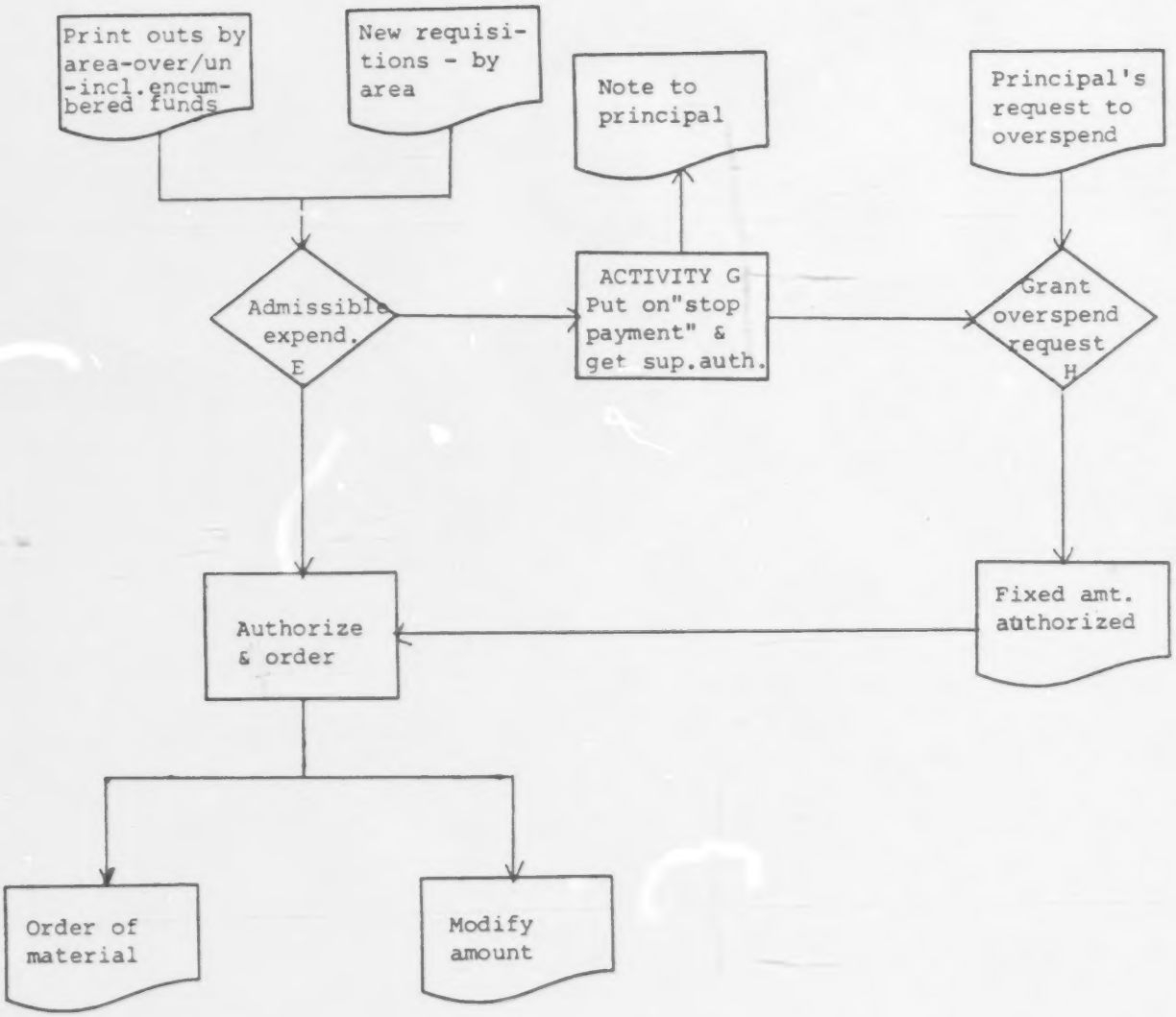
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.
D5,2,1	X											
D5,2,2					X		X					
D5,2,3					X	X						
D5,2,4												X
D5,2,5	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA	ANA
D5,2,6												

D1,1,2/R04/S20

BUDGET DISTRIBUTION AMONG SCHOOLS (FEB)

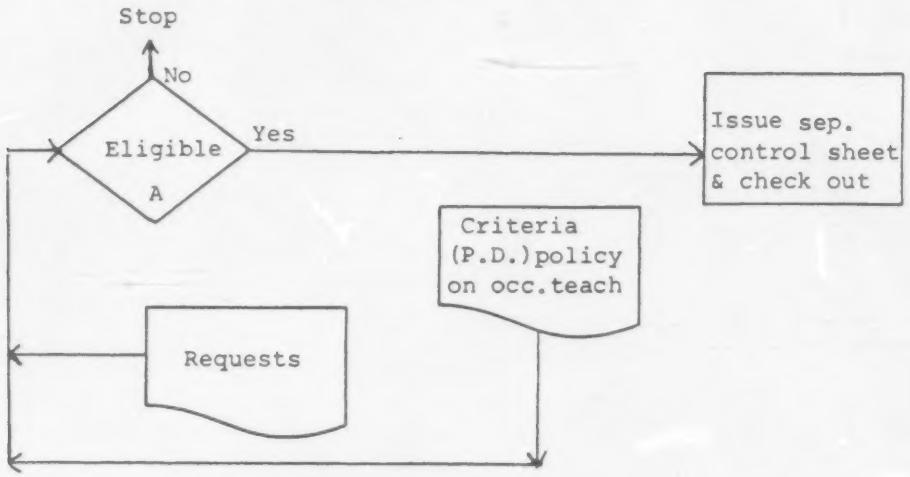


iii) Schools

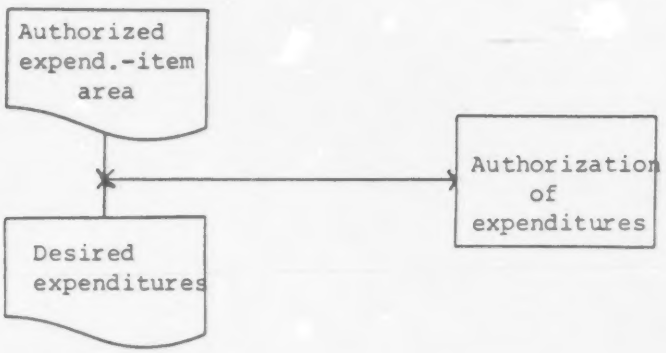

Print outs by area-over/un-incl.encum-bered funds
New requisi-tions - by area
Note to principal
Principal's request to overspend
Admissible expend. E
ACTIVITY G Put on"stop payment" & get sup.auth.
Grant overspend request H
Authorize & order
Fixed amt. authorized
Order of material
Modify amount

D1,1,3/R05 BUDGET CONTROL

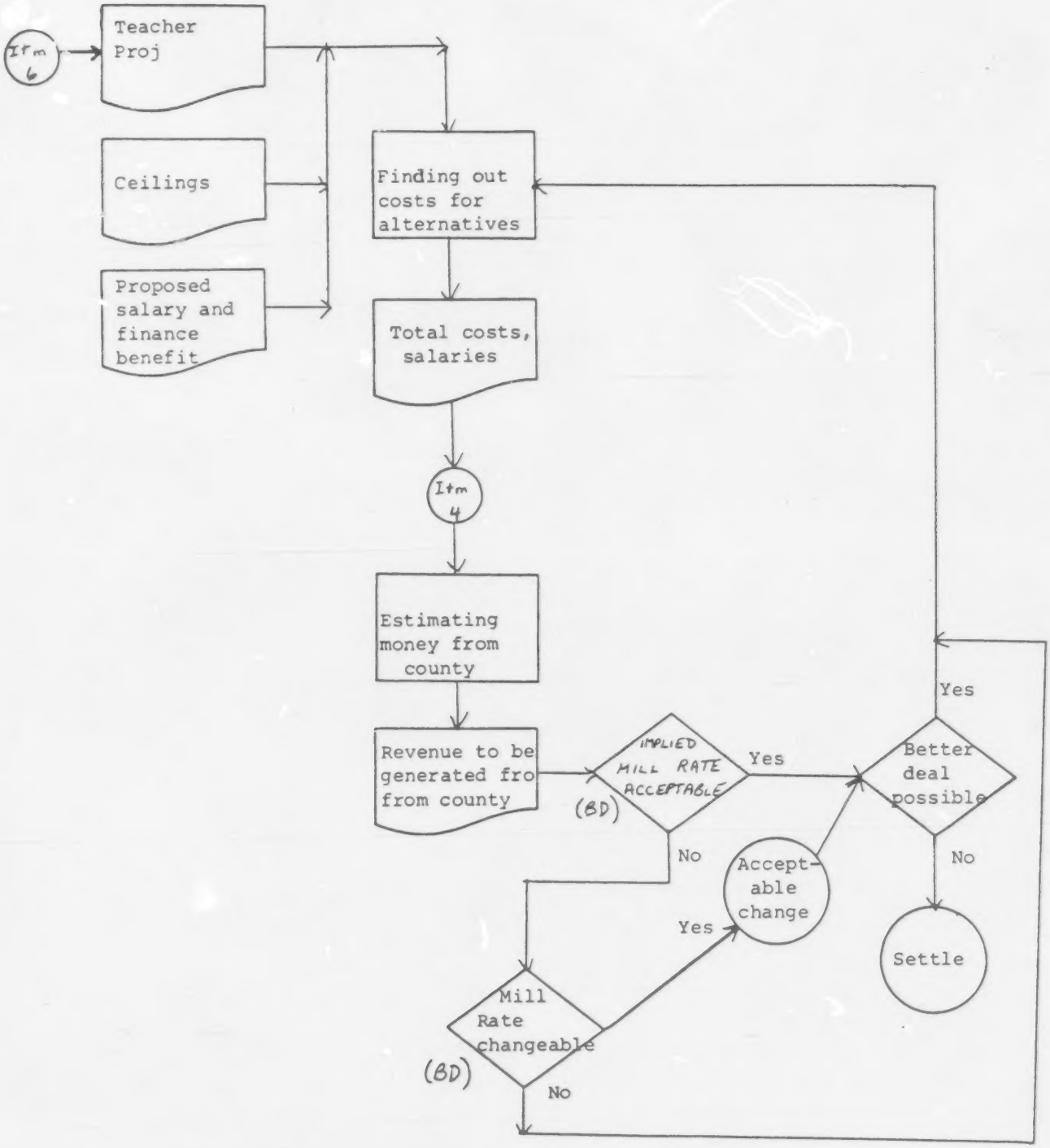
i) Courses, Conferences, Occasional Teach., etc.



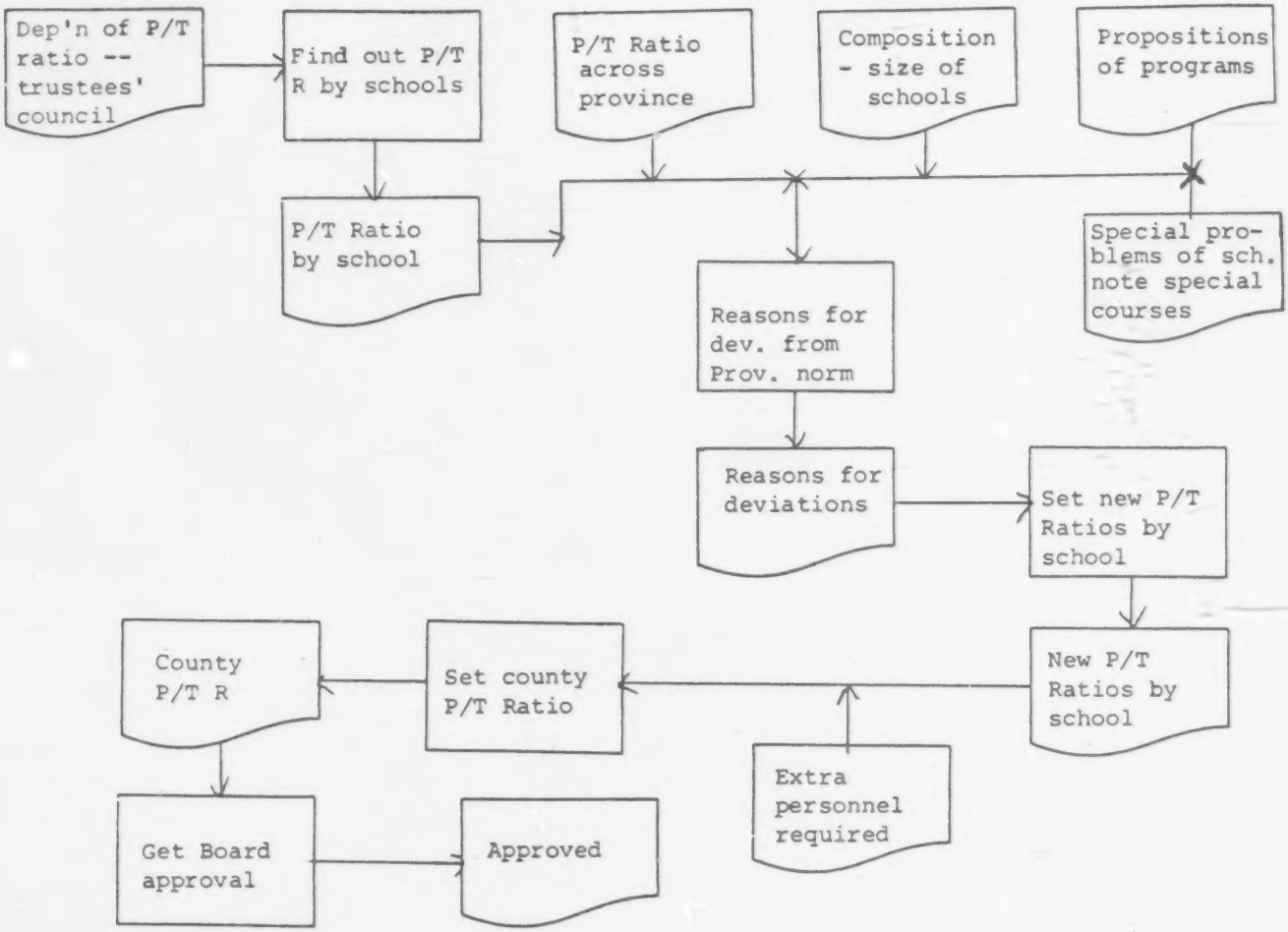
ii) Maintenance Items



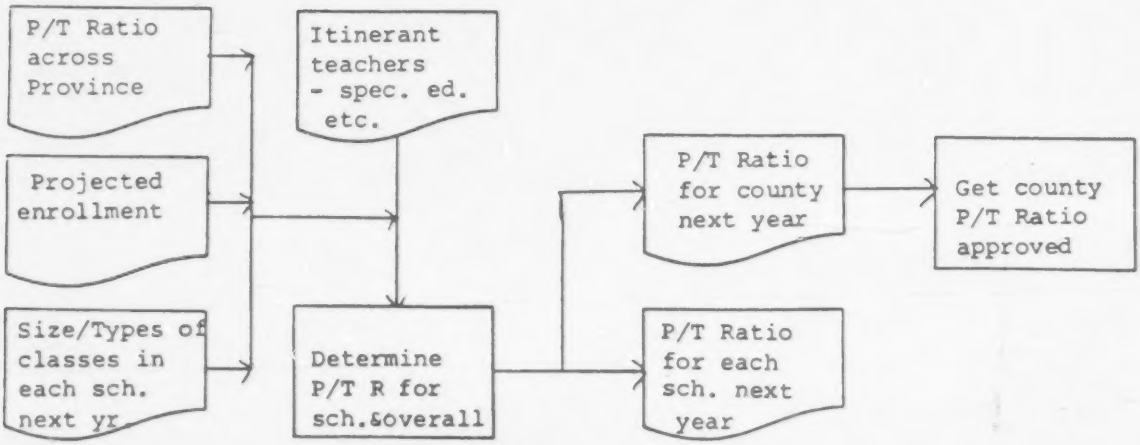
D2,4,2/R06 TEACHER SALARY NEGOTIATIONS



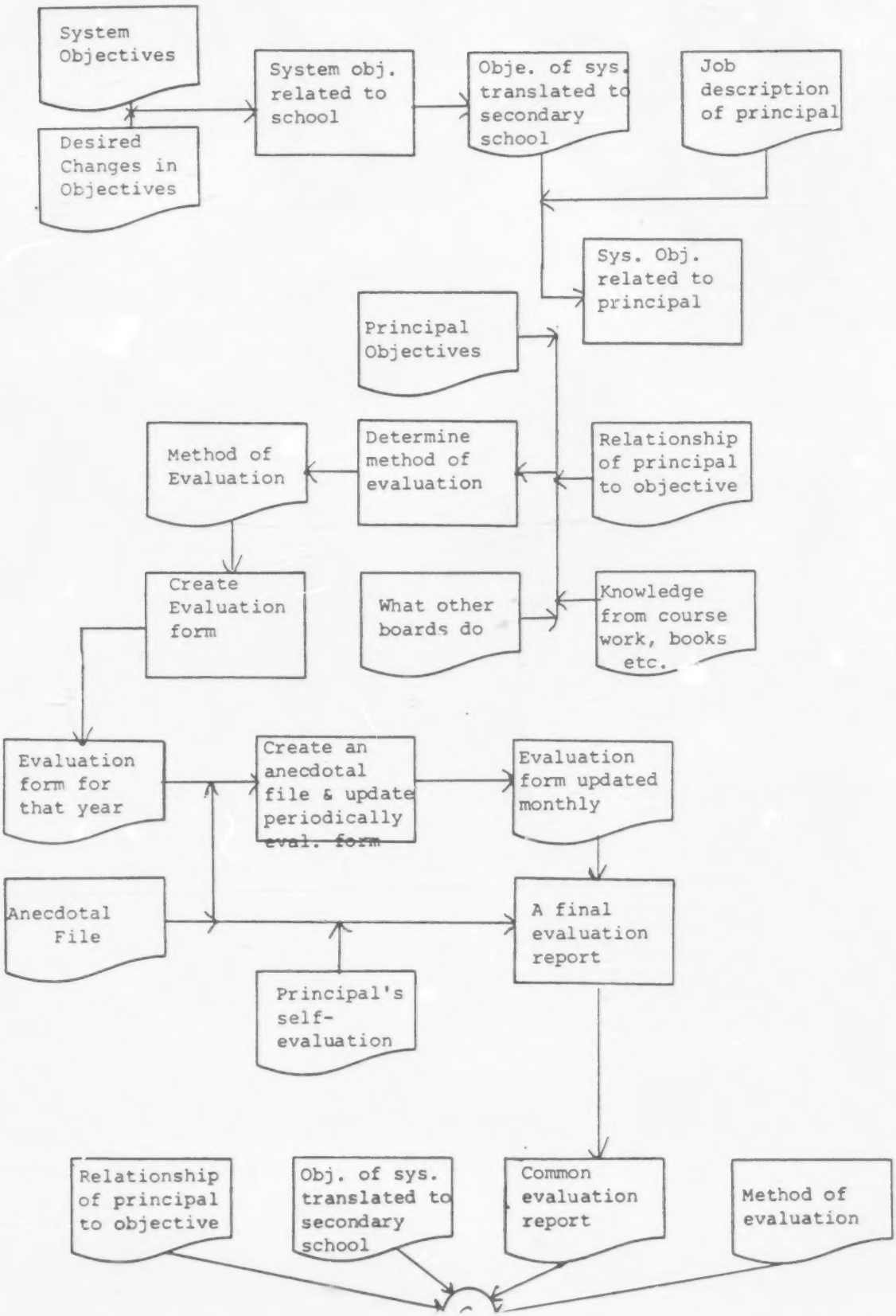
i) Secondary

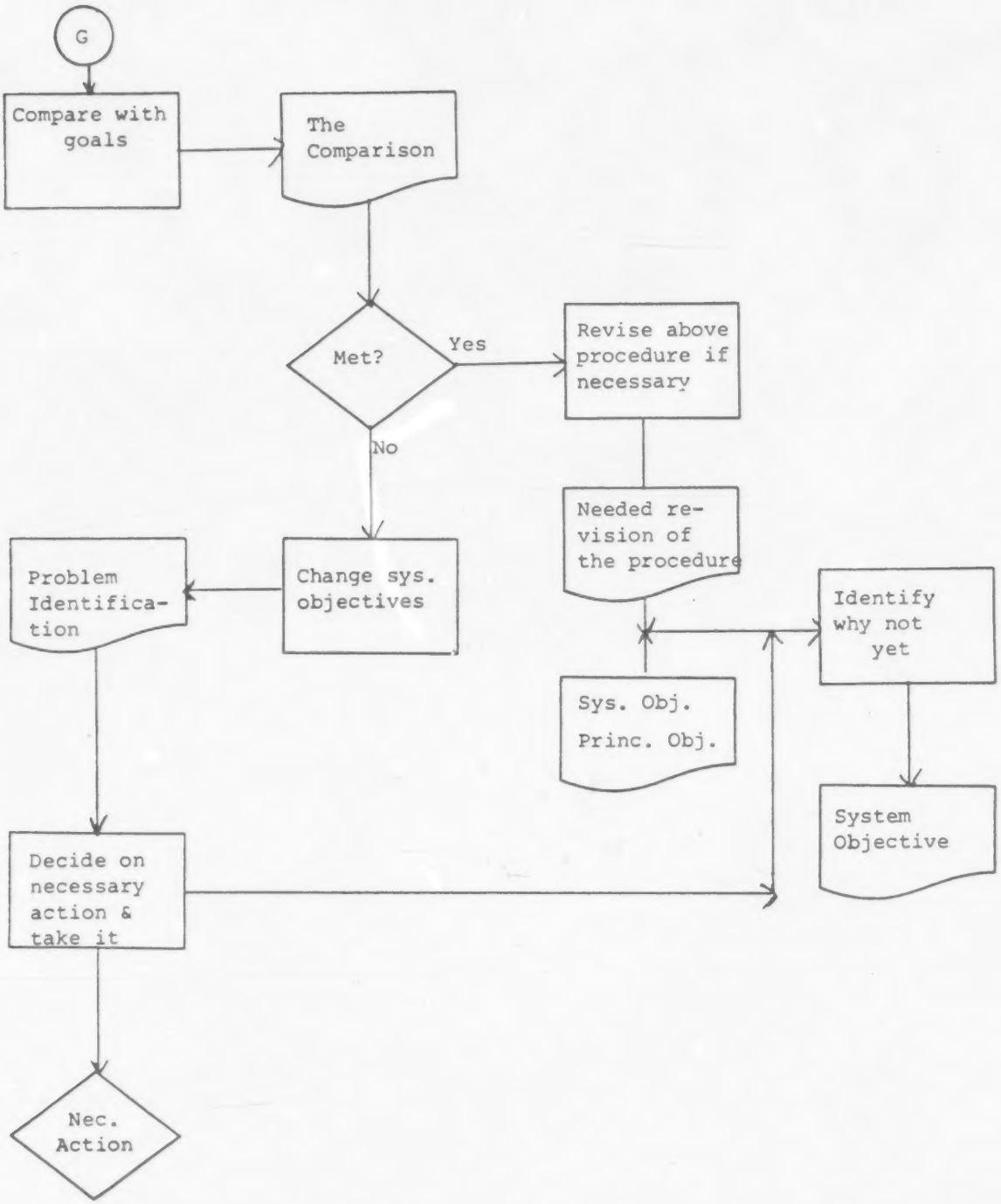

Dep'n of P/T ratio -- trustees' council
Find out P/T R by schools
P/T Ratio across province
Composition - size of schools
Propositions of programs
P/T Ratio by school
Special problems of sch. note special courses
Reasons for dev. from Prov. norm
Reasons for deviations
Set new P/T Ratios by school
County P/T R
Set county P/T Ratio
New P/T Ratios by school
Extra personnel required
Get Board approval
Approved

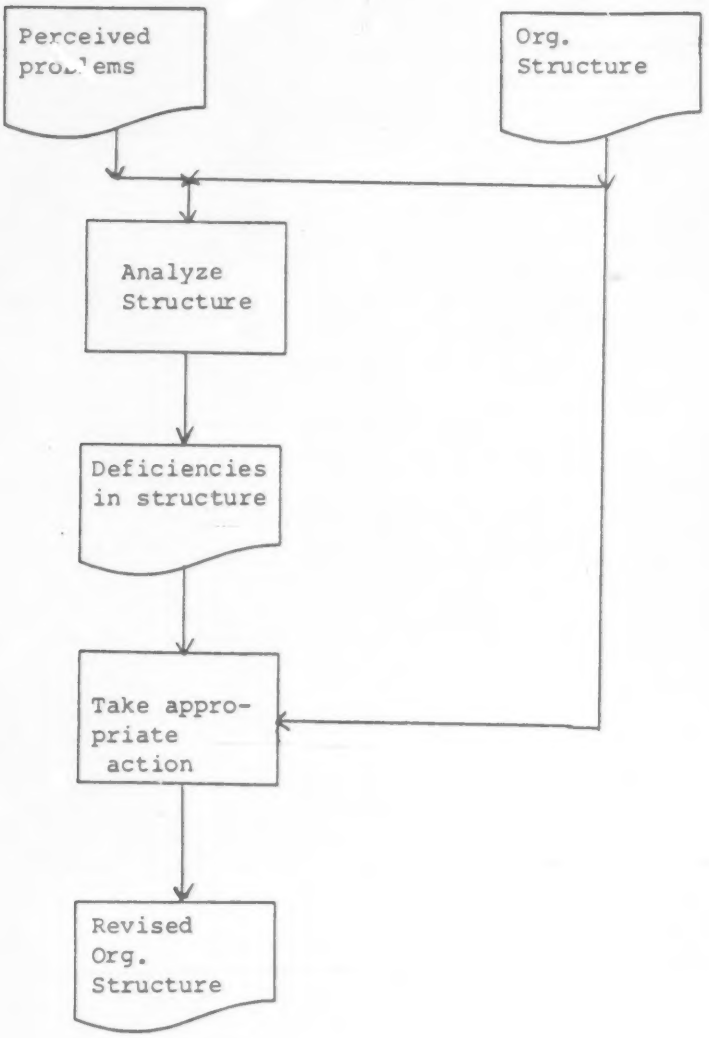
ii) Elementary


P/T Ratio across Province
Itinerant teachers - spec. ed. etc.
Projected enrollment
P/T Ratio for county next year
Get county P/T Ratio approved
Size/Types of classes in each sch. next yr.
Determine P/T R for sch.&overall
P/T Ratio for each sch. next year

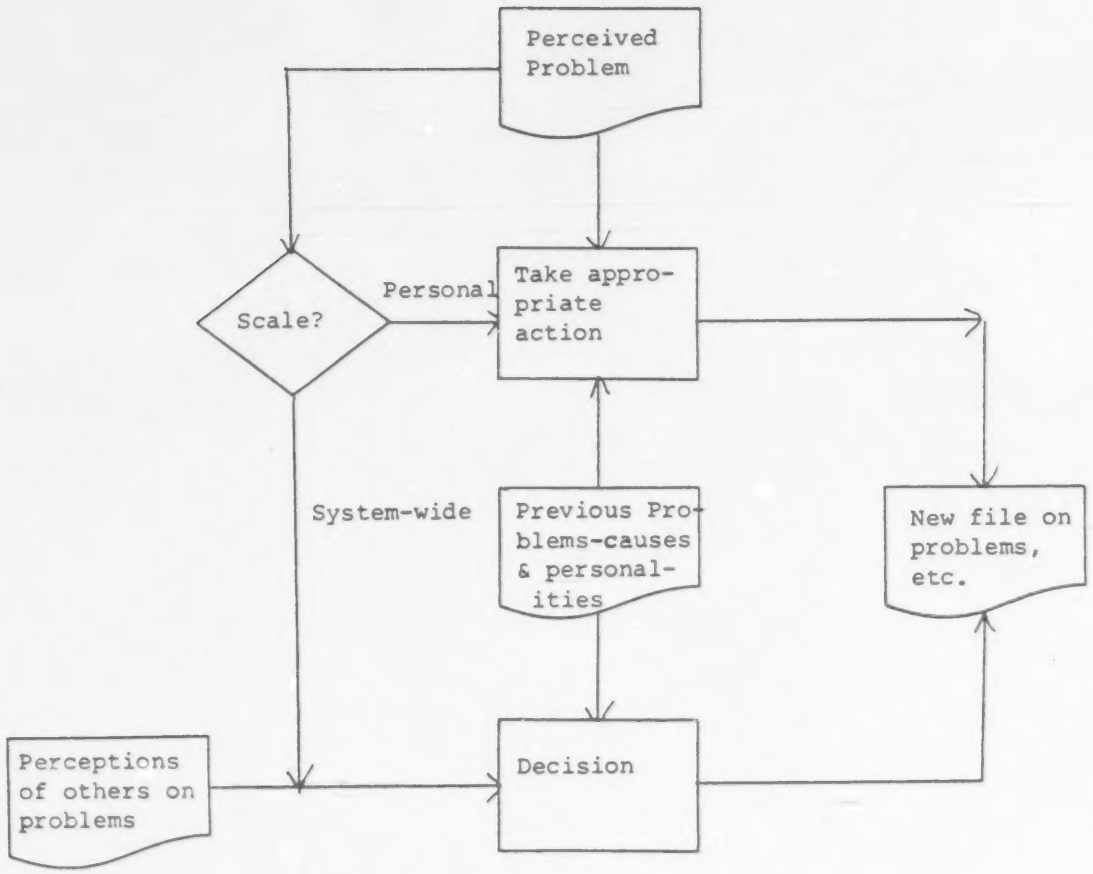
ASSESSMENT OF SECONDARY PRINCIPALS


System Objectives
Desired Changes in Objectives
System obj. related to school
Obje. of sys. translated to secondary school
Job description of principal
Sys. Obj. related to principal
Principal Objectives
Method of Evaluation
Determine method of evaluation
Relationship of principal to objective
Create Evaluation form
What other boards do
Knowledge from course work, books etc.
Evaluation form for that year
Create an anecdotal file & update periodically
eval. form
Evaluation form updated monthly
Anecdotal File
A final evaluation report
Principal's self-evaluation
Relationship of principal to objective
Obj. of sys. translated to secondary school
Common evaluation report
Method of evaluation


G
Compare with goals
The Comparison
Met?
Yes
No
Revise above procedure if necessary
Needed re-vision of the procedure
Identify why not yet
Sys. Obj.
Princ. Obj.
System Objective
Change sys. objectives
Problem Identifica-tion
Decide on necessary action & take it
Nec. Action

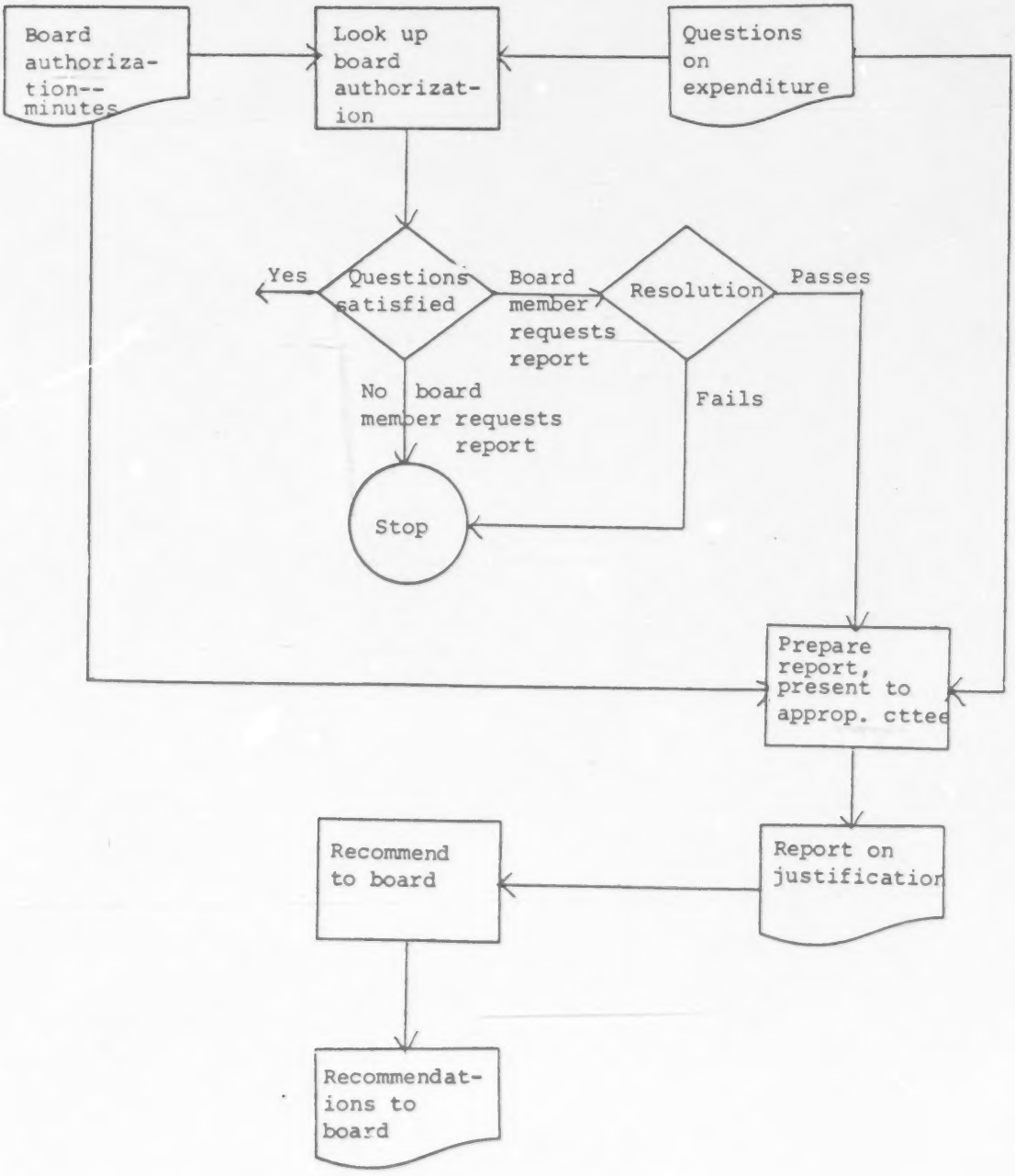

Perceived problems
Org. Structure
Analyze Structure
Deficiencies in structure
Take appro-priate action
Revised Org. Structure

D3,1,4/R11 STAFF MORALE AND WELFARE PROBLEMS



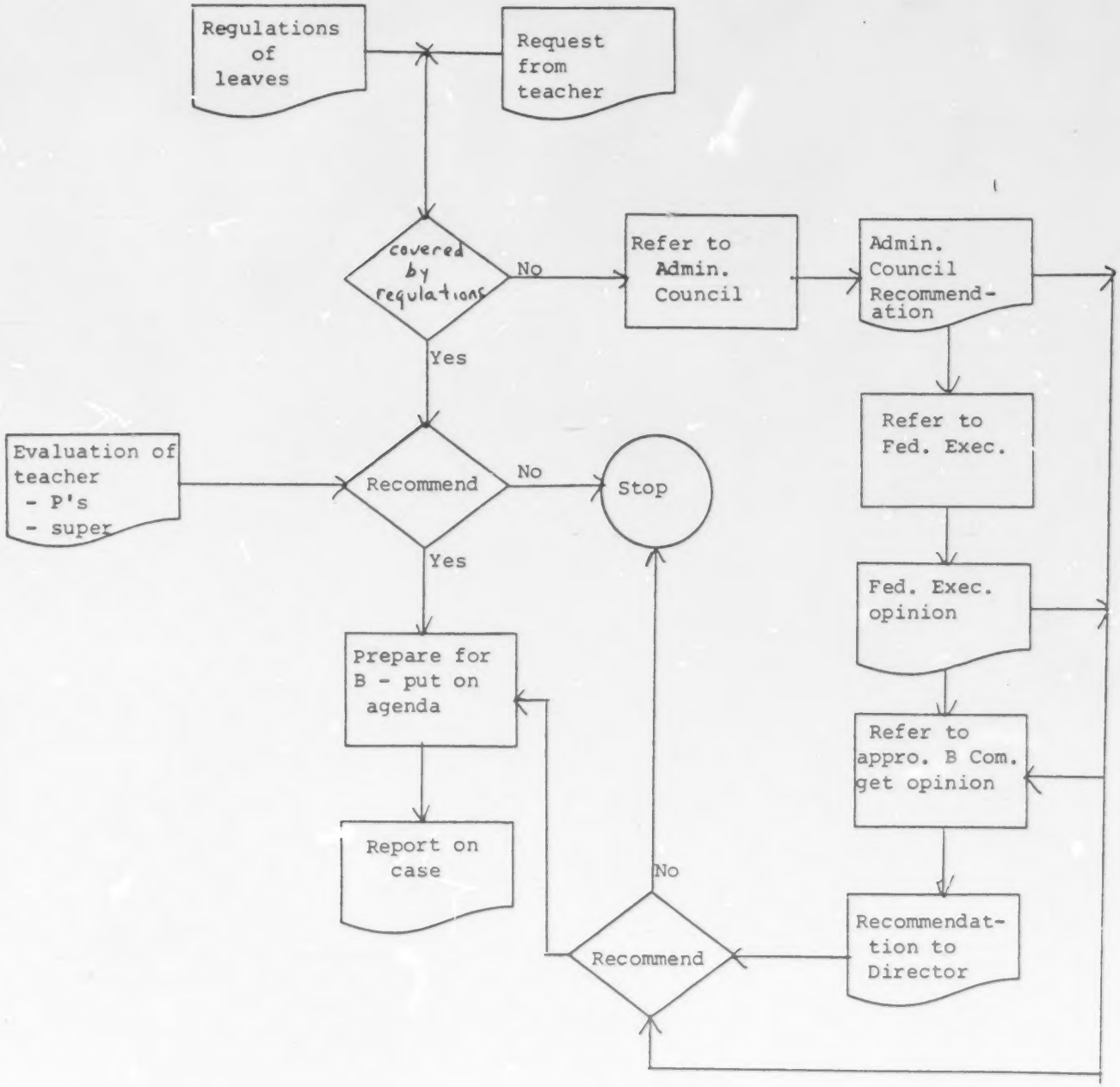
D3,2,1/R13

JUSTIFICATION OF SPENDING

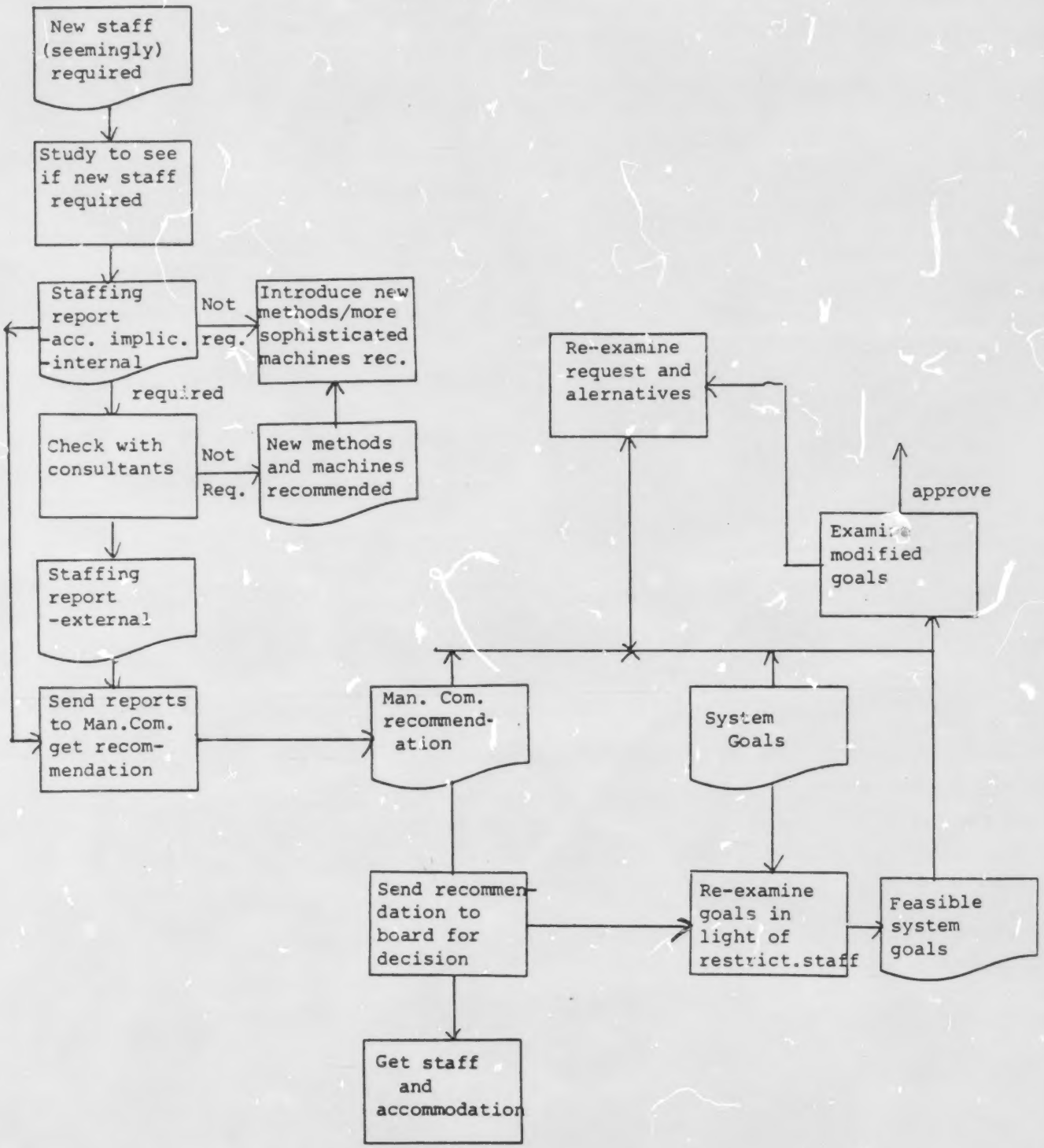


D2,1,10/R14

LEAVES OF ABSENCE

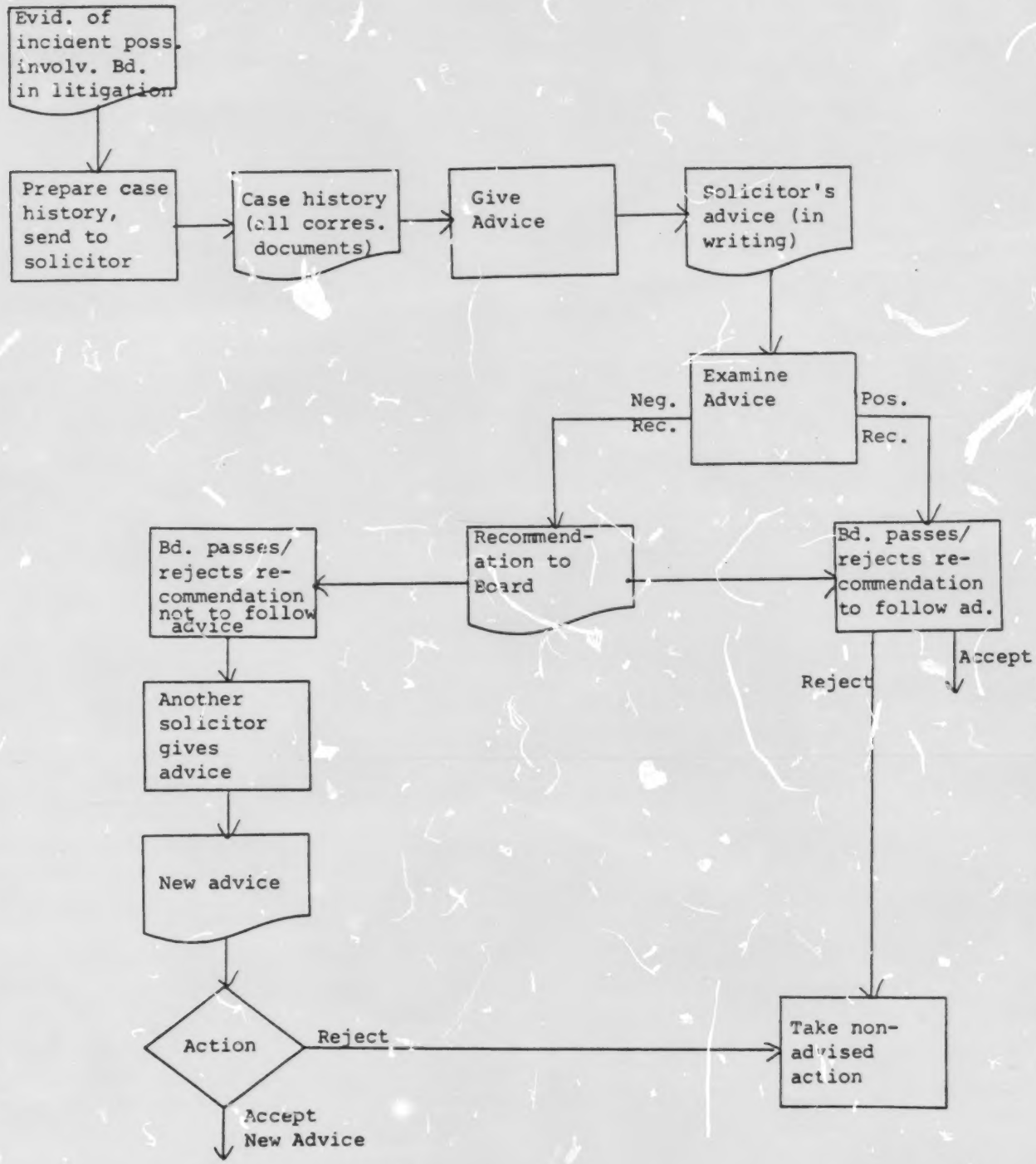


D5,2,4/R15 BOARD OFFICE ACCOMMODATION

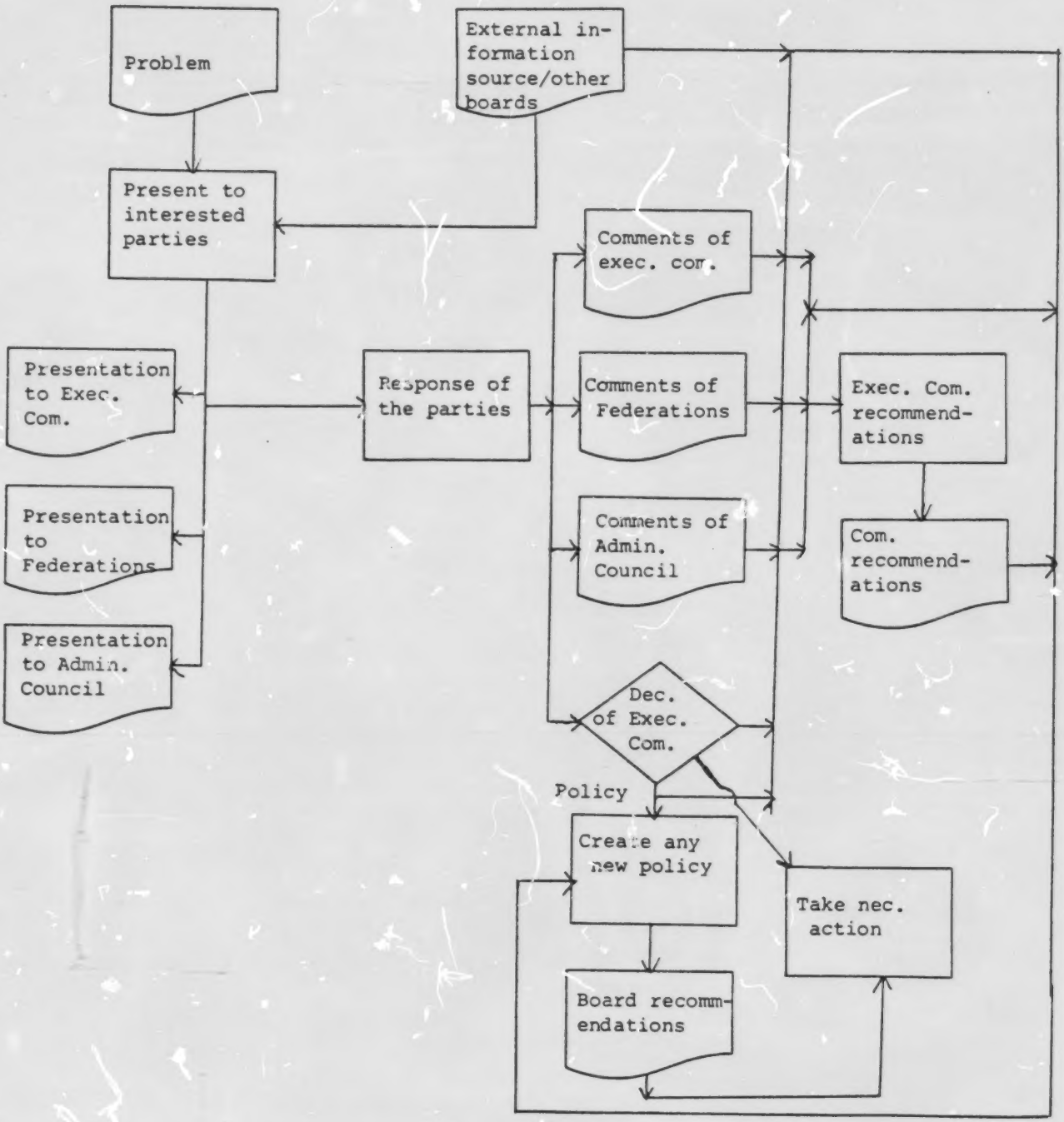


D3,1,6/R16

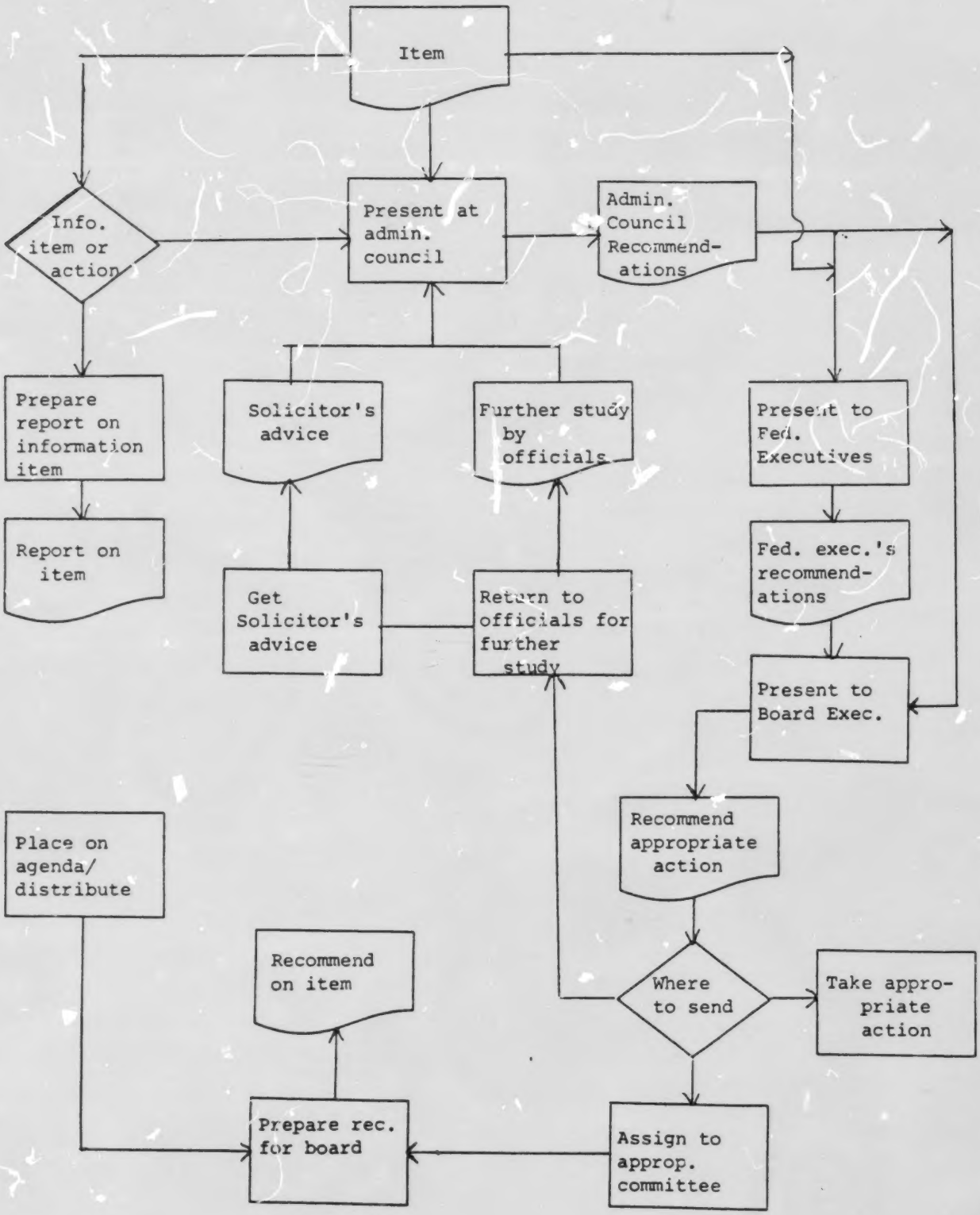
ITEMS TO BE REFERRED TO BOARD'S SOLICITOR



D3,1,5/R18 ITEMS REFERRED TO BOARD OR ADMINISTRATION

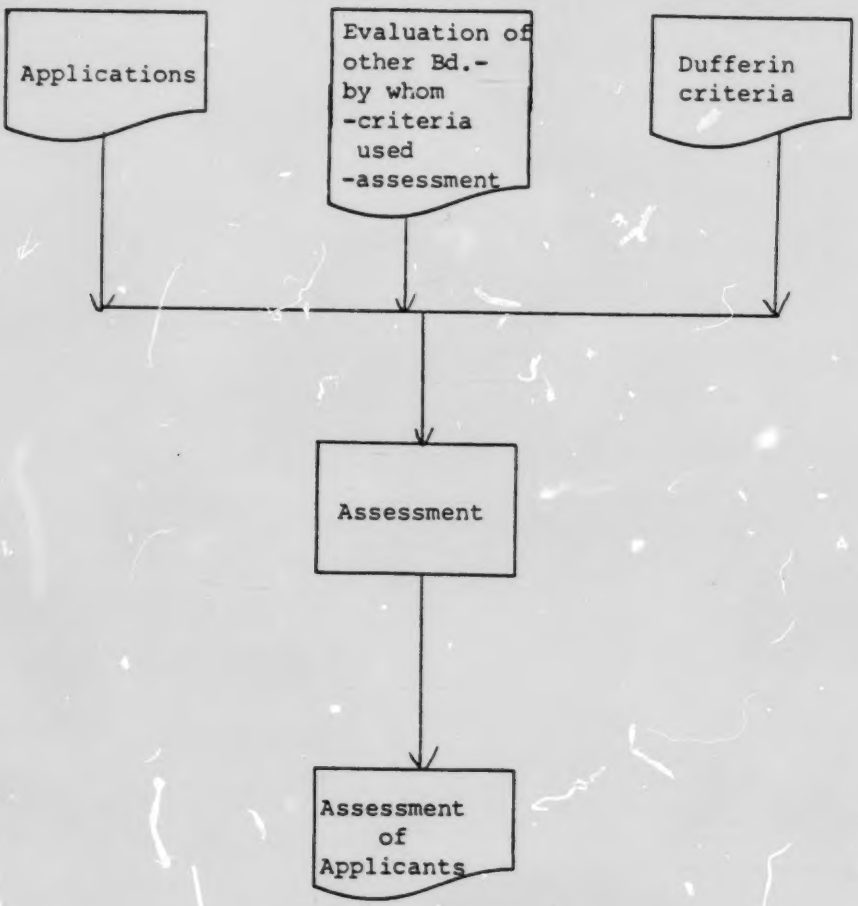


BD3,1,2/R19.1 AGENDA ITEMS: BOARD/EXECUTIVE

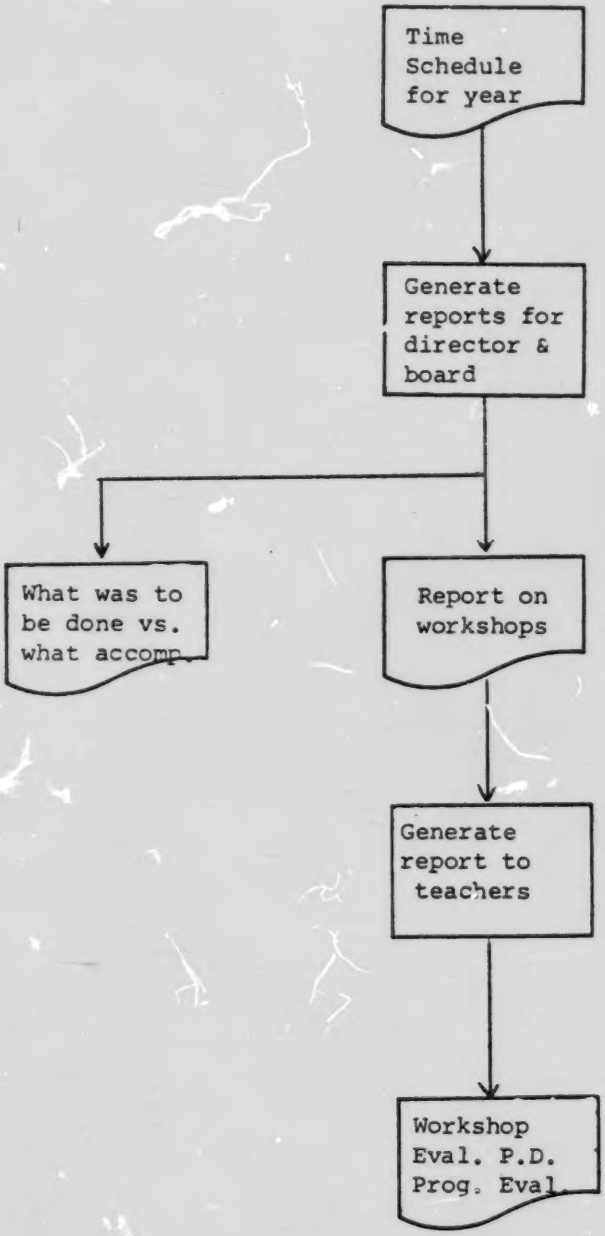


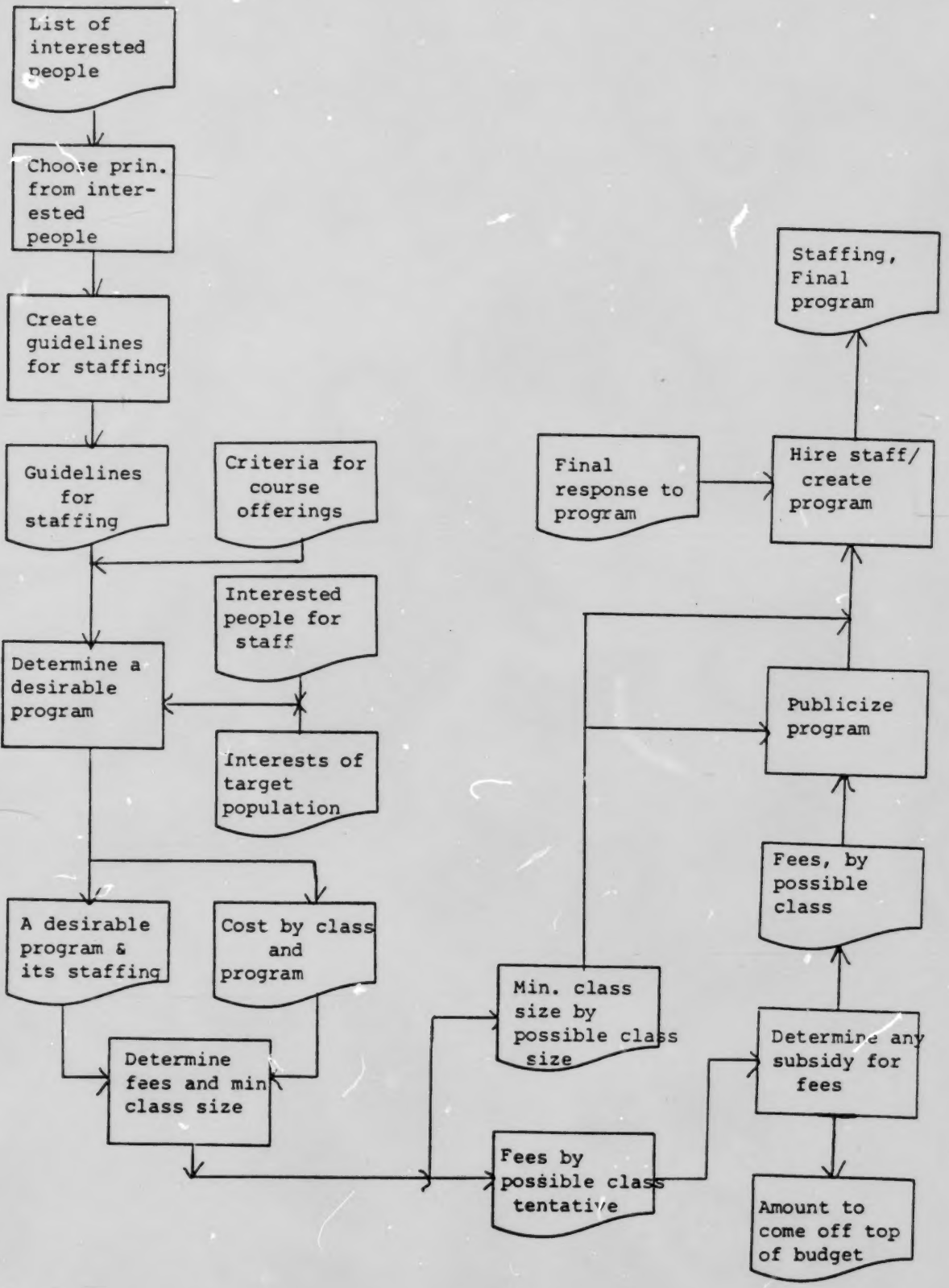
D3,1,2/R19.2 ITEMS FOR MANAGEMENT COMMITTEE

D2,2,4/R20/S10 ASSESSMENT OF COMPETENCY OF EXPERIENCED TEACHER APPLICANTS

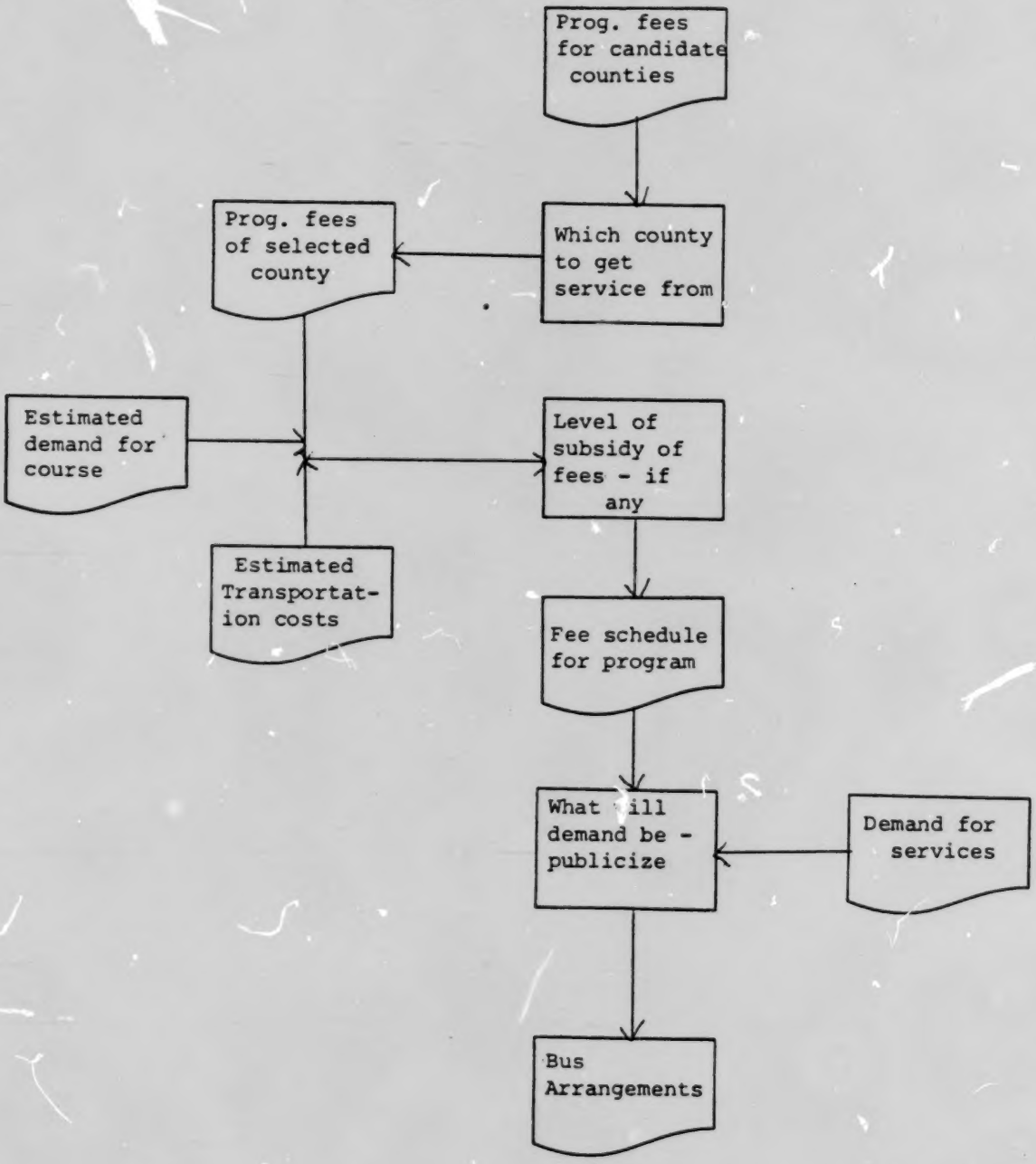


D3,1,2/M01 REPORTING: ACCOMMODATION/MAINTENANCE


Time Schedule for year
Generate reports for director & board
What was to be done vs. what accomp.
Report on workshops
Generate report to teachers
Workshop Eval. P.D. Prog. Eval.

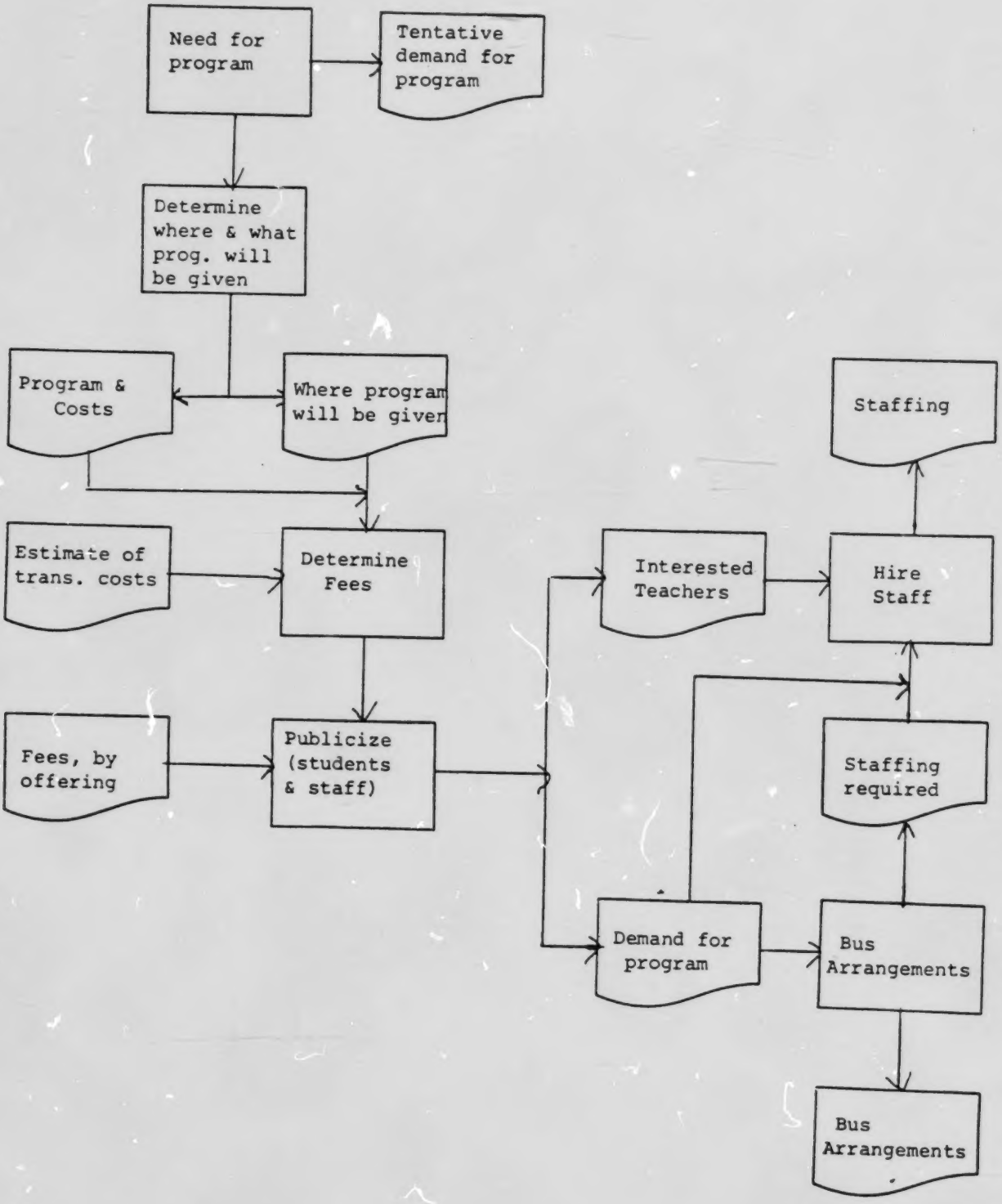

List of interested people
Choose prin. from interested people
Create guidelines for staffing
Guidelines for staffing
Criteria for course offerings
Interested people for staff
Determine a desirable program
Interests of target population
A desirable program & its staffing
Cost by class and program
Determine fees and min class size
Min. class size by possible class size
Fees by possible class tentative
Staffing, Final program
Final response to program
Hire staff/ create program
Publicize program
Fees, by possible class
Determine any subsidy for fees
Amount to come off top of budget

i) Secondary


Prog. fees for candidate counties
Which county to get service from
Prog. fees of selected county
Estimated demand for course
Level of subsidy of fees - if any
Estimated Transportation costs
Fee schedule for program
What will demand be - publicize
Demand for services
Bus Arrangements

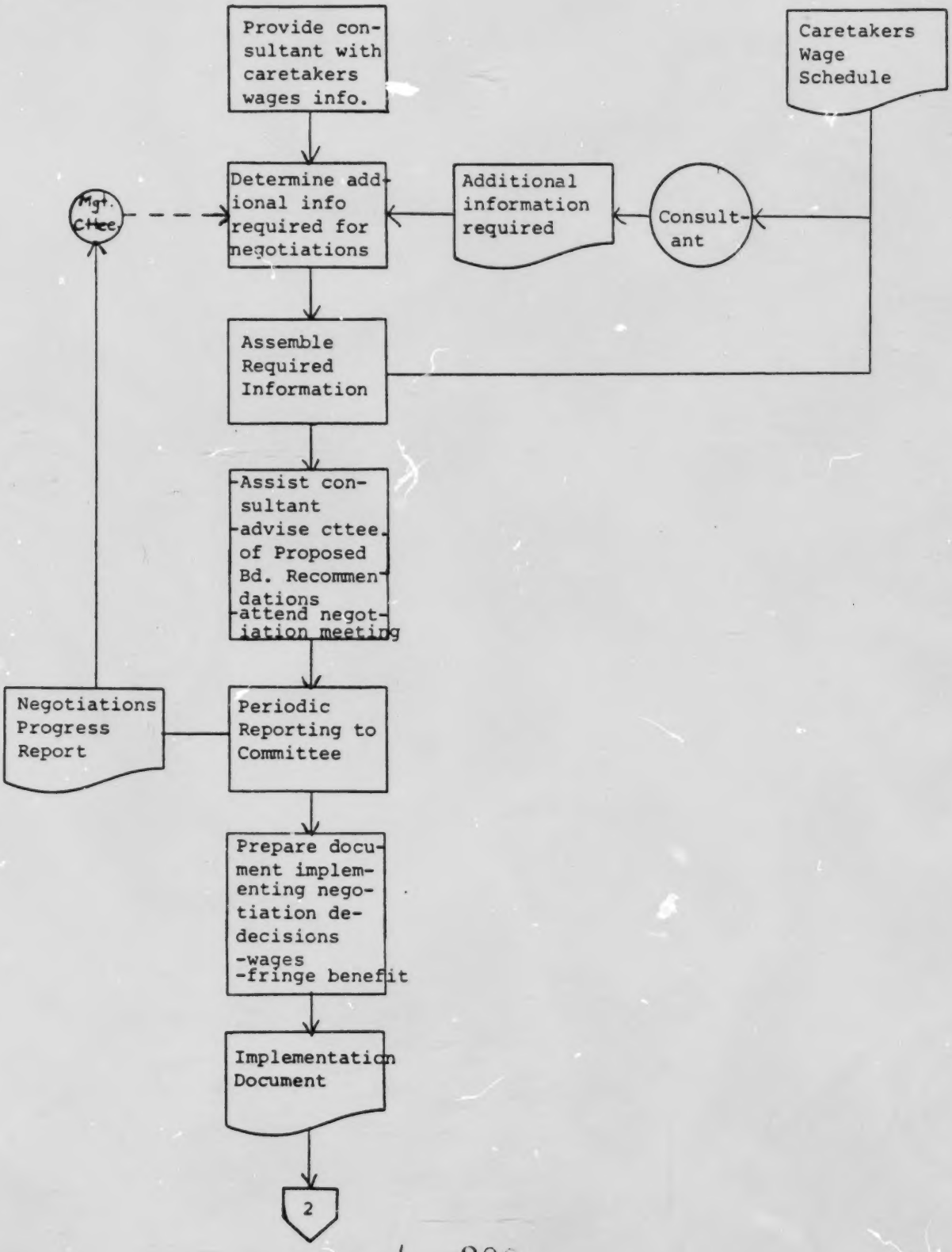
D1,2,4/M03

ii) Elementary

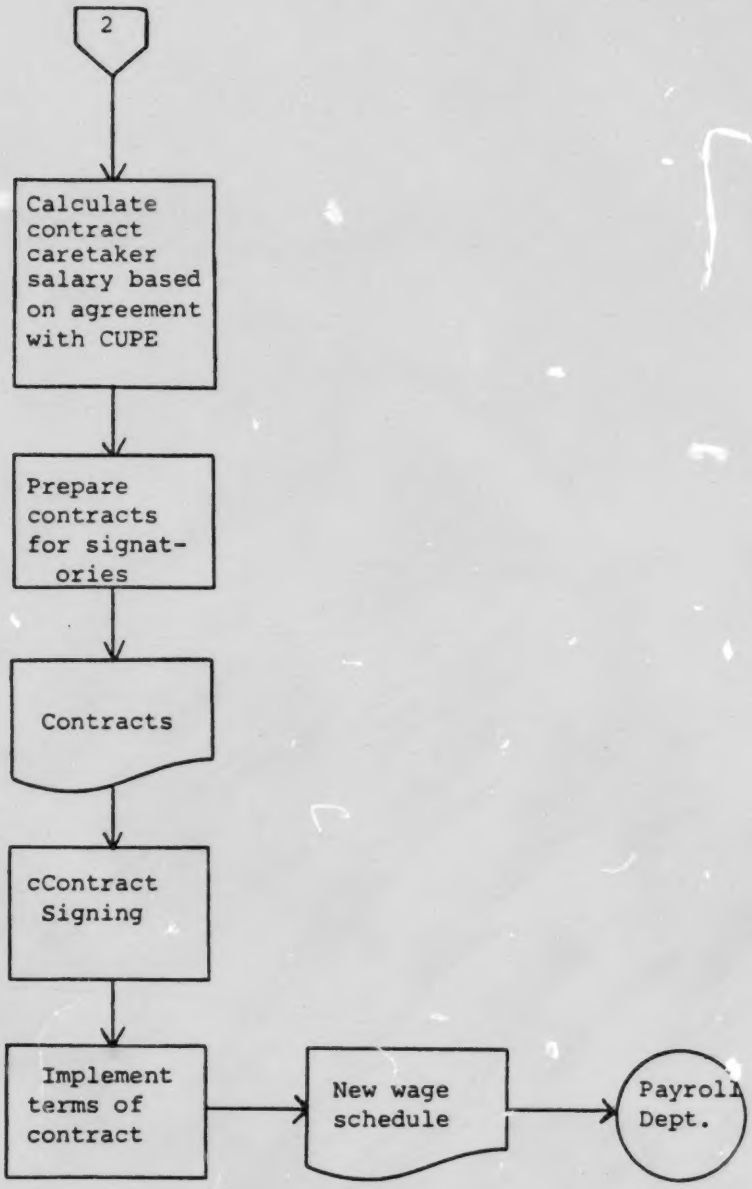


D2,4,1/M04 DETERMINATION OF RECOMMENDATIONS REGARDING SALARY PROPOSALS FOR NON-TEACHING STAFF (Caretakers and Office Personnel)

a) Caretakers

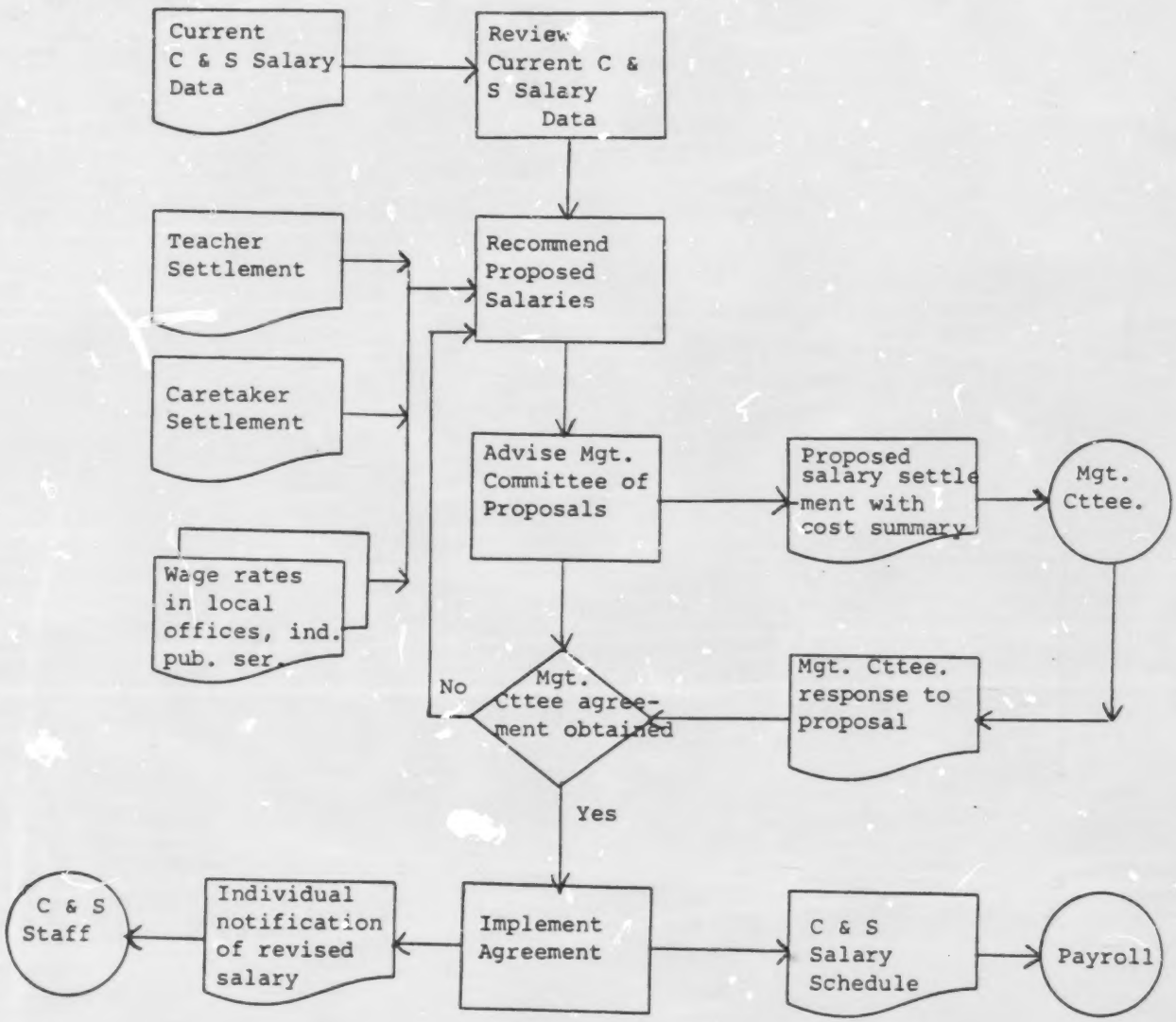


D2,4,1/M04


2
Calculate contract caretaker salary based on agreement with CUPE
Prepare contracts for signat-ories
Contracts
cContract Signing
Implement terms of contract
New wage schedule
Payroll Dept.

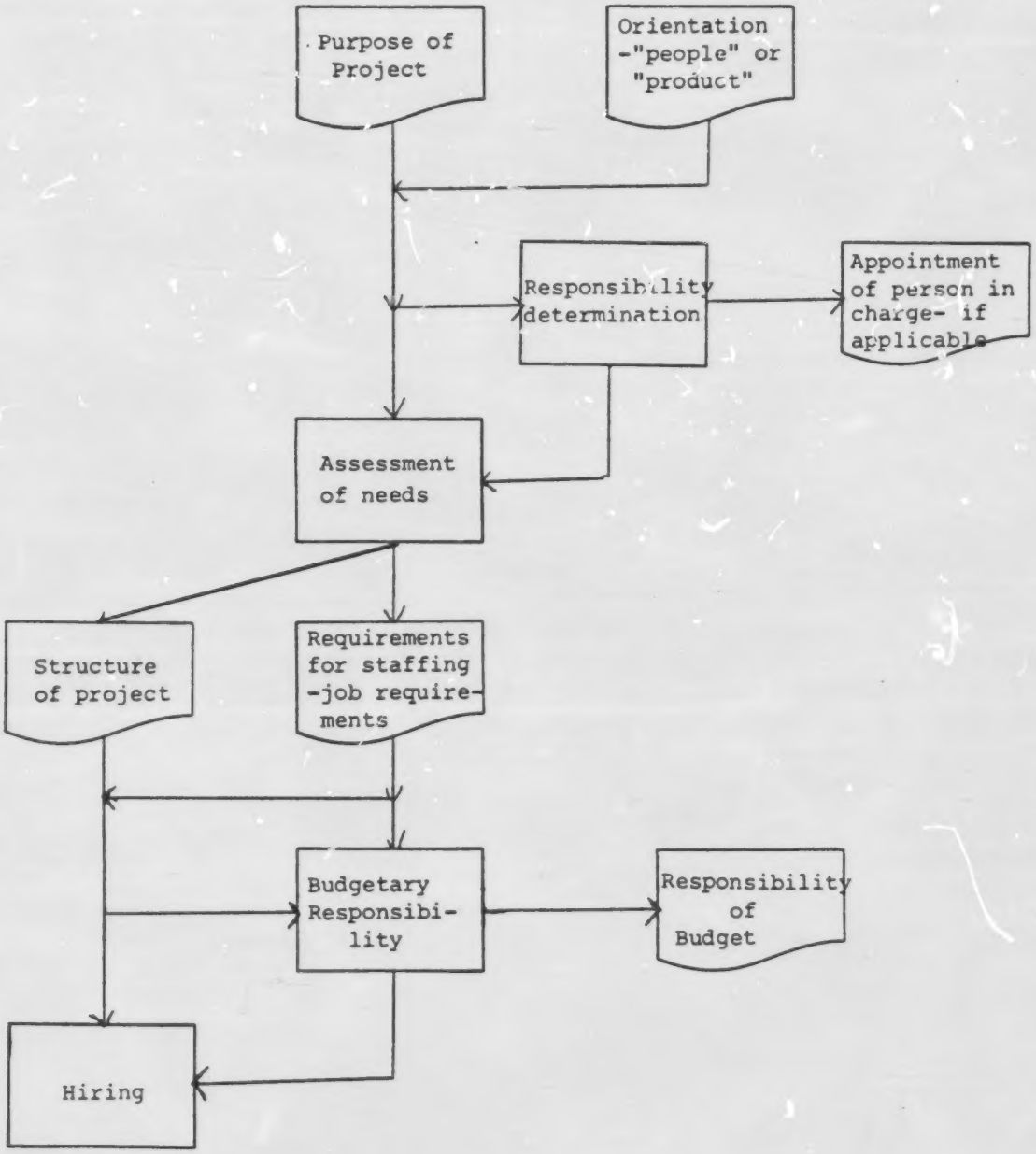
D2,4,1/M04 DETERMINATION OF RECOMMENDATIONS REGARDING SALARY PROPOSALS FOR NON-TEACHING STAFF (Caretakers and Office Personnel)

b) Clerical & Secretarial Staff

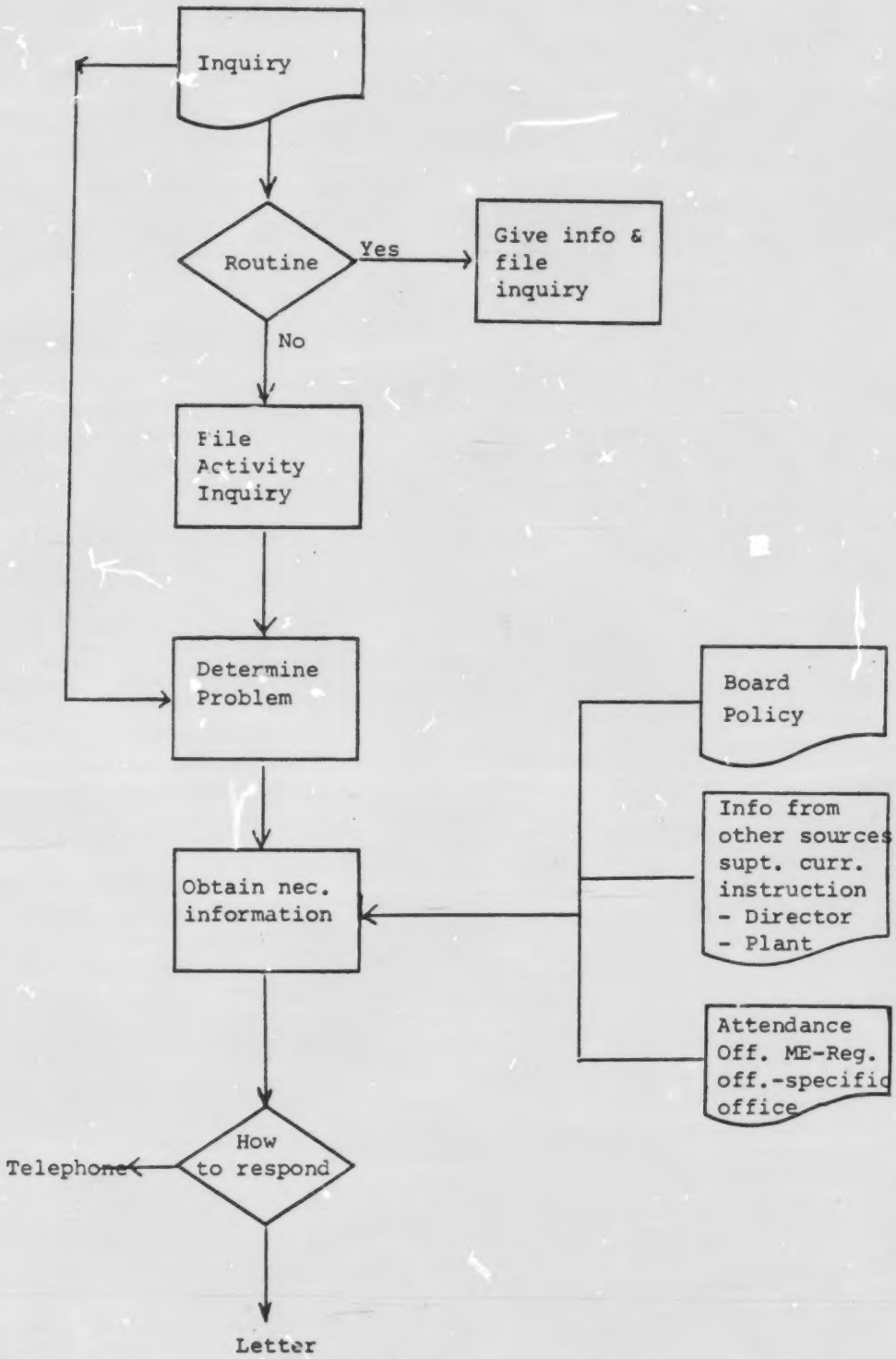


D2,2,2/M05

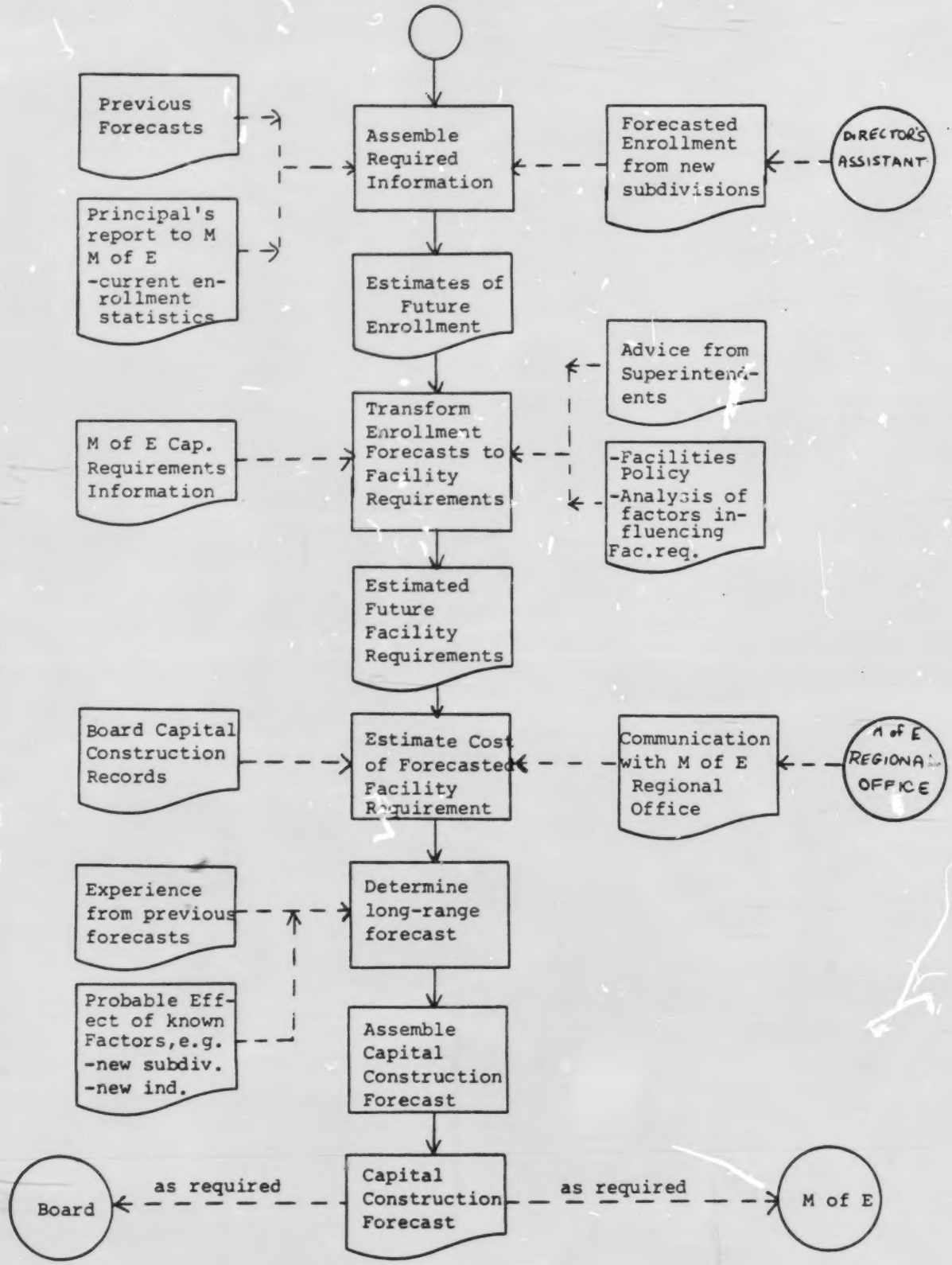
STAFFING OF SPECIAL PROJECTS

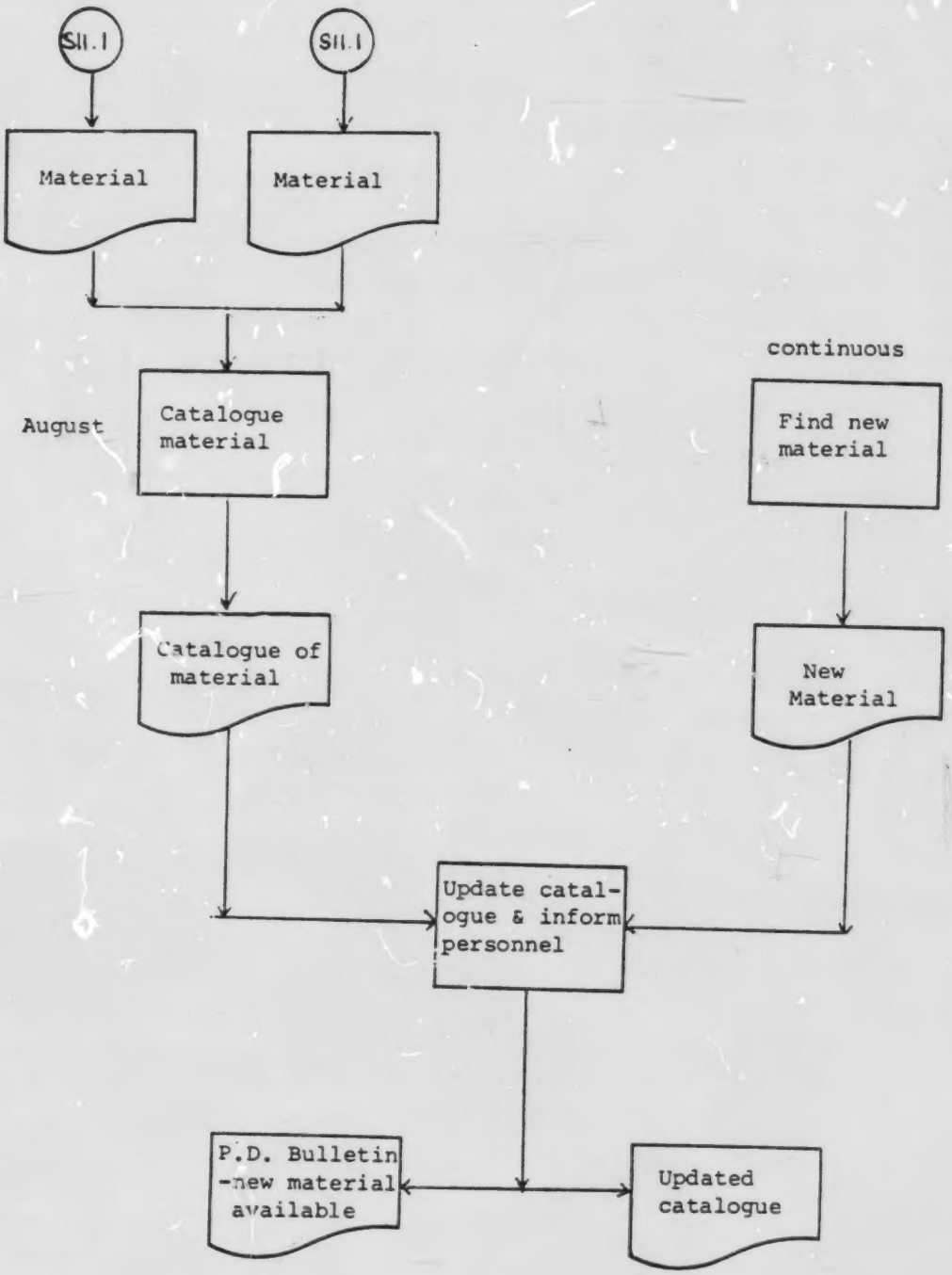


D3,2,2/M06/B01/B06 ANSWERS TO PUBLIC RE INQUIRIES RE SCHOOL AREAS, BUS ROUTES, ETC.



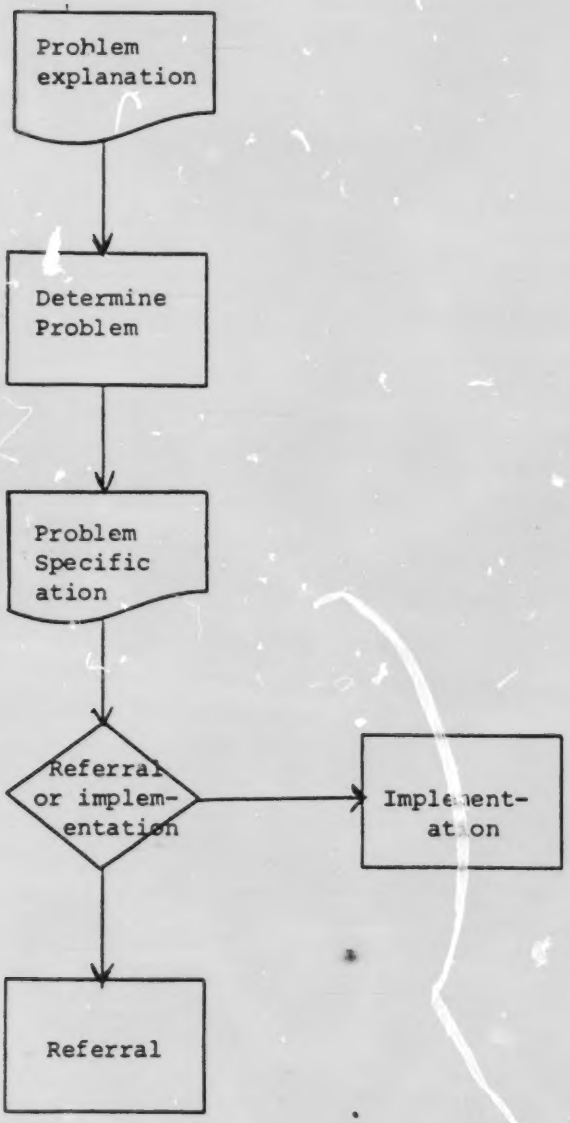
D5,2,1/M07/B03 DETERMINATION OF RECOMMENDATIONS REGARDING CAPITAL CONSTRUCTION FORECASTS


Previous Forecasts
Principal's report to M M of E -current enrollment statistics
Assemble Required Information
Forecasted Enrollment from new subdivisions
DIRECTOR'S ASSISTANT
Estimates of Future Enrollment
Advice from Superintendents
M of E Cap. Requirements Information
Transform Enrollment Forecasts to Facility Requirements
-Facilities Policy
-Analysis of factors influencing Fac.req.
Estimated Future Facility Requirements
Board Capital Construction Records
Estimate Cost of Forecasted Facility Requirement
Communication with M of E Regional Office
M of E REGIONAL OFFICE
Experience from previous forecasts
Probable Effect of known Factors, e.g. -new subdiv. -new ind.
Determine long-range forecast
Assemble Capital Construction Forecast
Board
as required
Capital Construction Forecast
as required
M of E

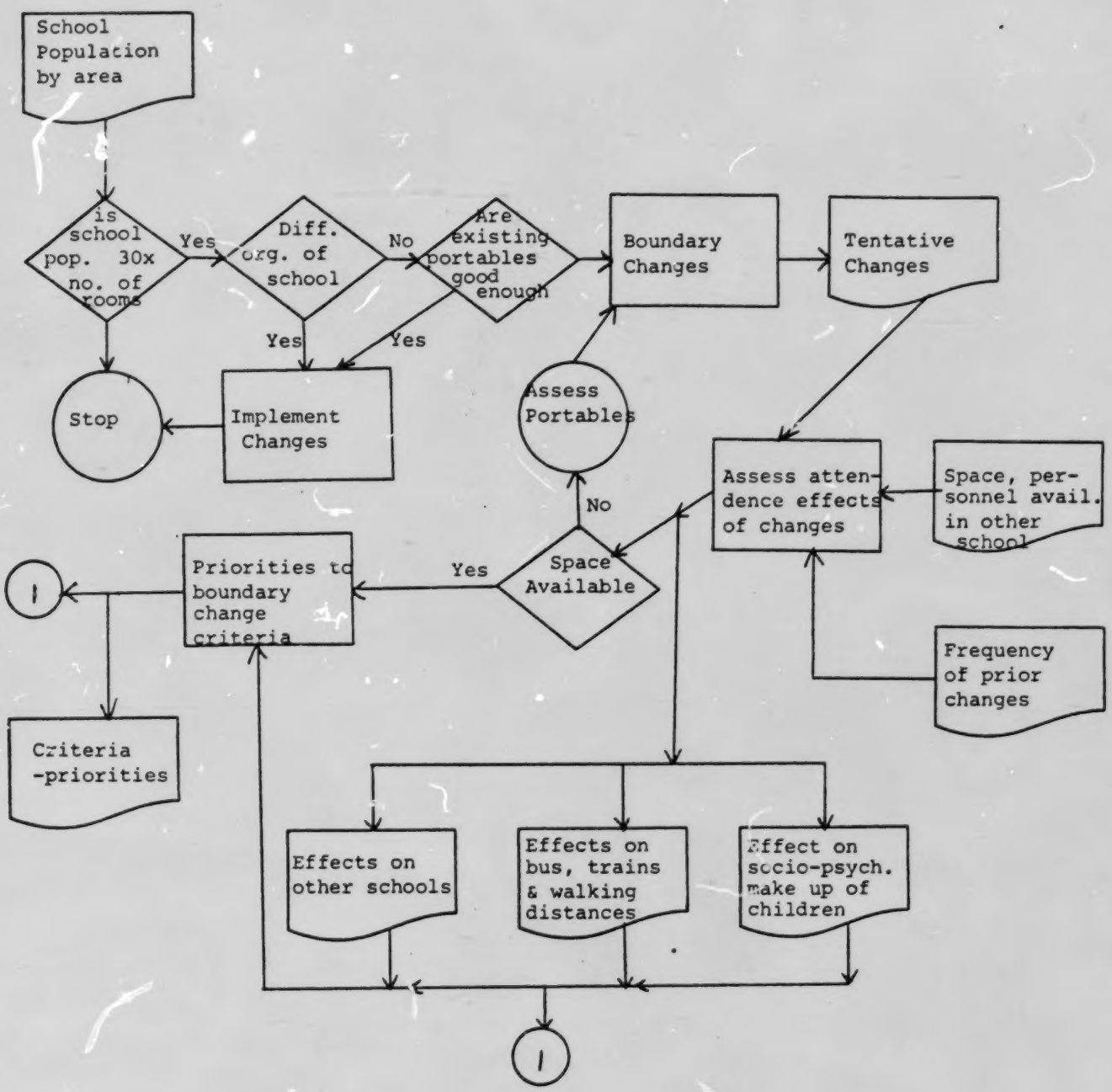

SII.1
SII.1
Material
Material
August
Catalogue material
Catalogue of material
continuous
Find new material
New Material
Update catal-ogue & inform personnel
P.D. Bulletin -new material available
Updated catalogue

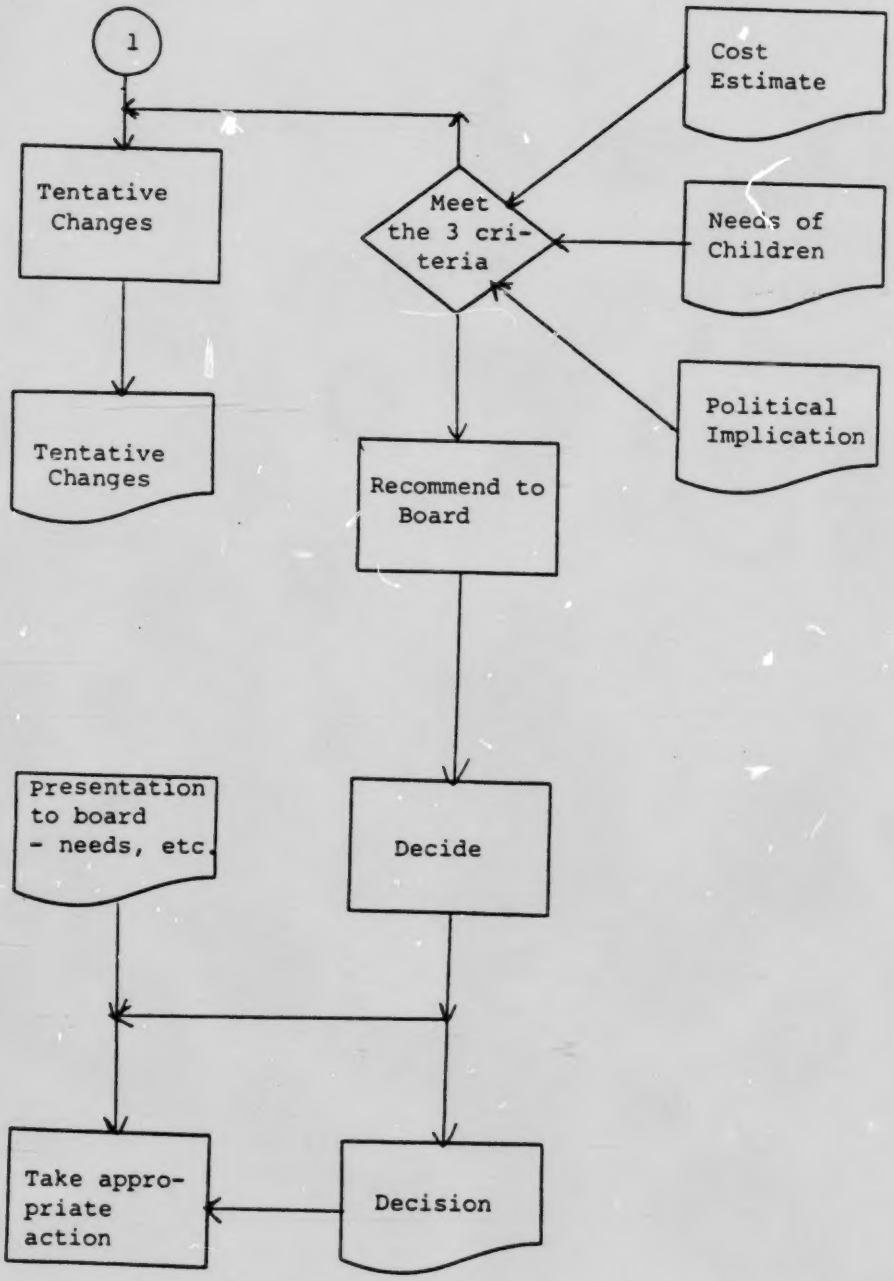
D5,1,1/M09

PROBLEMS REFERRED BY PLANT SUPERVISORS, SPECIAL EDUCATION AND OTHER SUPERINTENDENTS

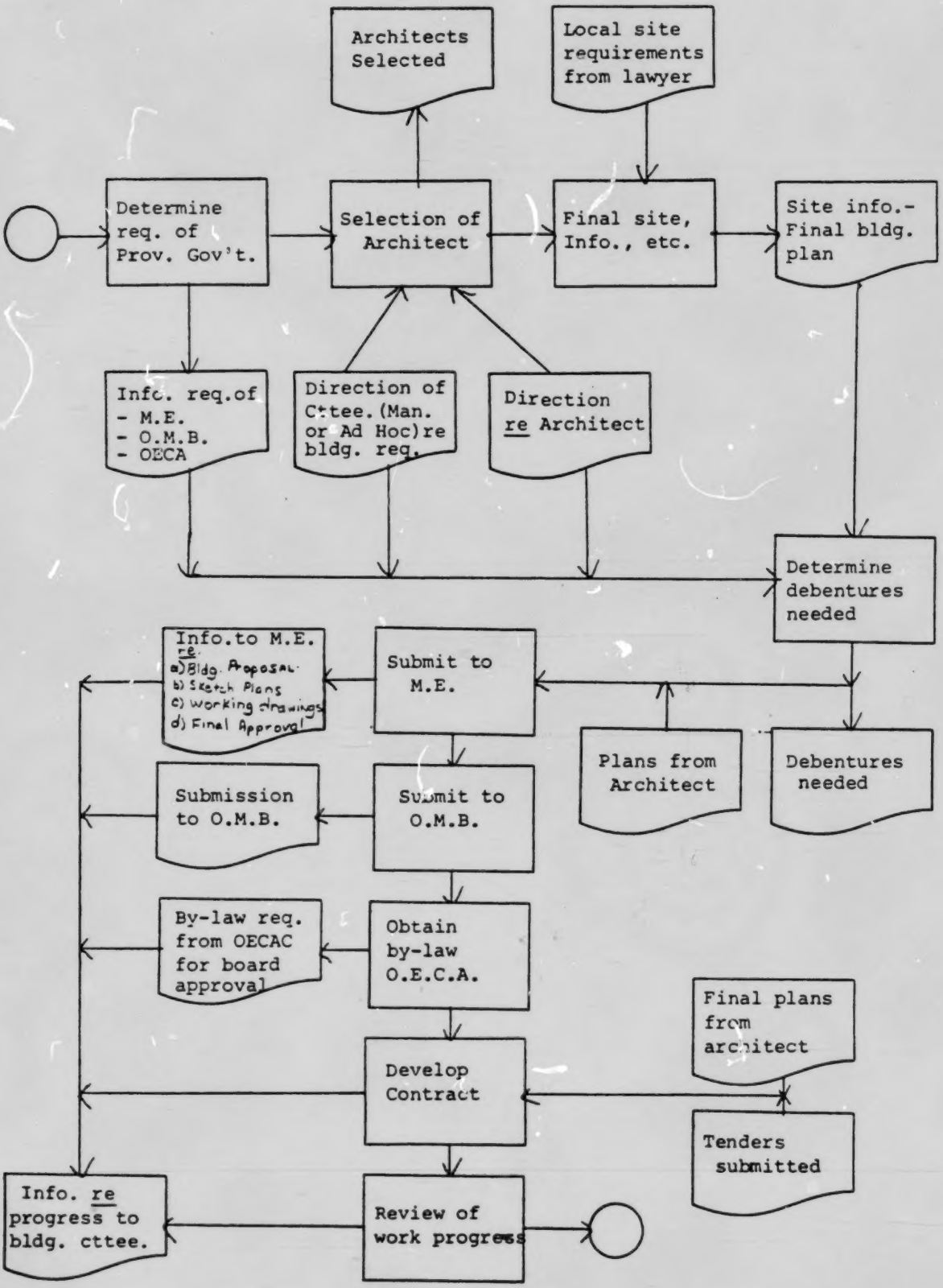


D5,2,2/S08/M10 NECESSARY CHANGES IN ATTENDANCE AREAS




1
Tentative Changes
Tentative Changes
Meet the 3 criteria
Cost Estimate
Needs of Children
Political Implication
Recommend to Board
Presentation to board - needs, etc.
Decide
Take appropriate action
Decision

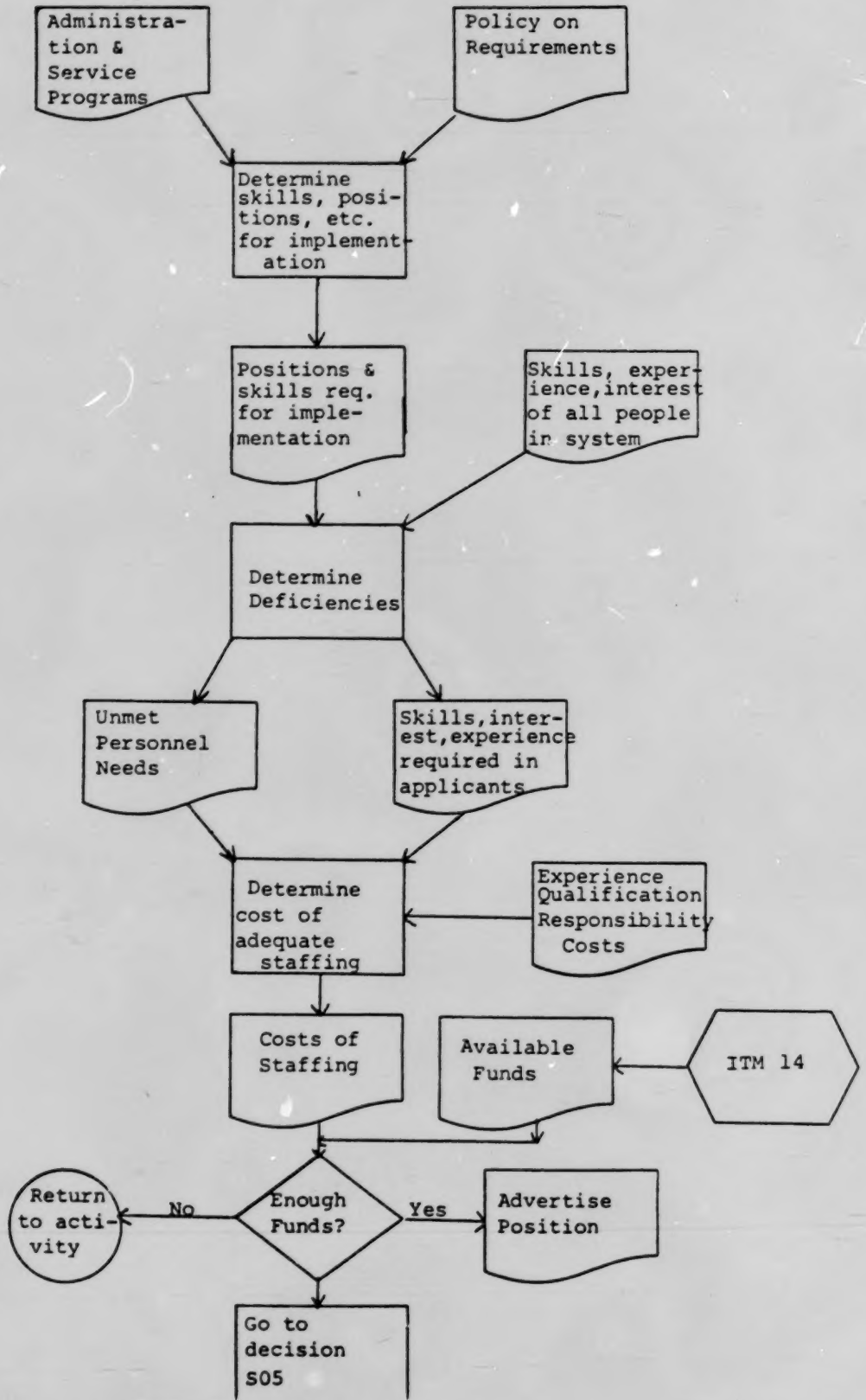
B5,2,5/B05/M11 DETERMINATION OF INFORMATION REQUIRED RE APPLICATIONS FOR BUILDING APPROVALS


Architects Selected
Local site requirements from lawyer
Determine req. of Prov. Gov't.
Selection of Architect
Final site, Info., etc.
Site info.- Final bldg. plan
Info. req.of - M.E. - O.M.B. - OECA
Direction of Cttee. (Man. or Ad Hoc) re bldg. req.
Direction re Architect
Determine debentures needed
Info.to M.E. re a) Bldg. Proposal b) Sketch Plans c) Working drawings d) Final Approval
Submit to M.E.
Plans from Architect
Debentures needed
Submission to O.M.B.
Submit to O.M.B.
By-law req. from OECAC for board approval
Obtain by-law O.E.C.A.
Final plans from architect
Develop Contract
Tenders submitted
Info. re progress to bldg. cttee.
Review of work progress

ACCOMMODATION REQUIREMENTS FOR SCHOOLS - BUILDING PROPOSALS

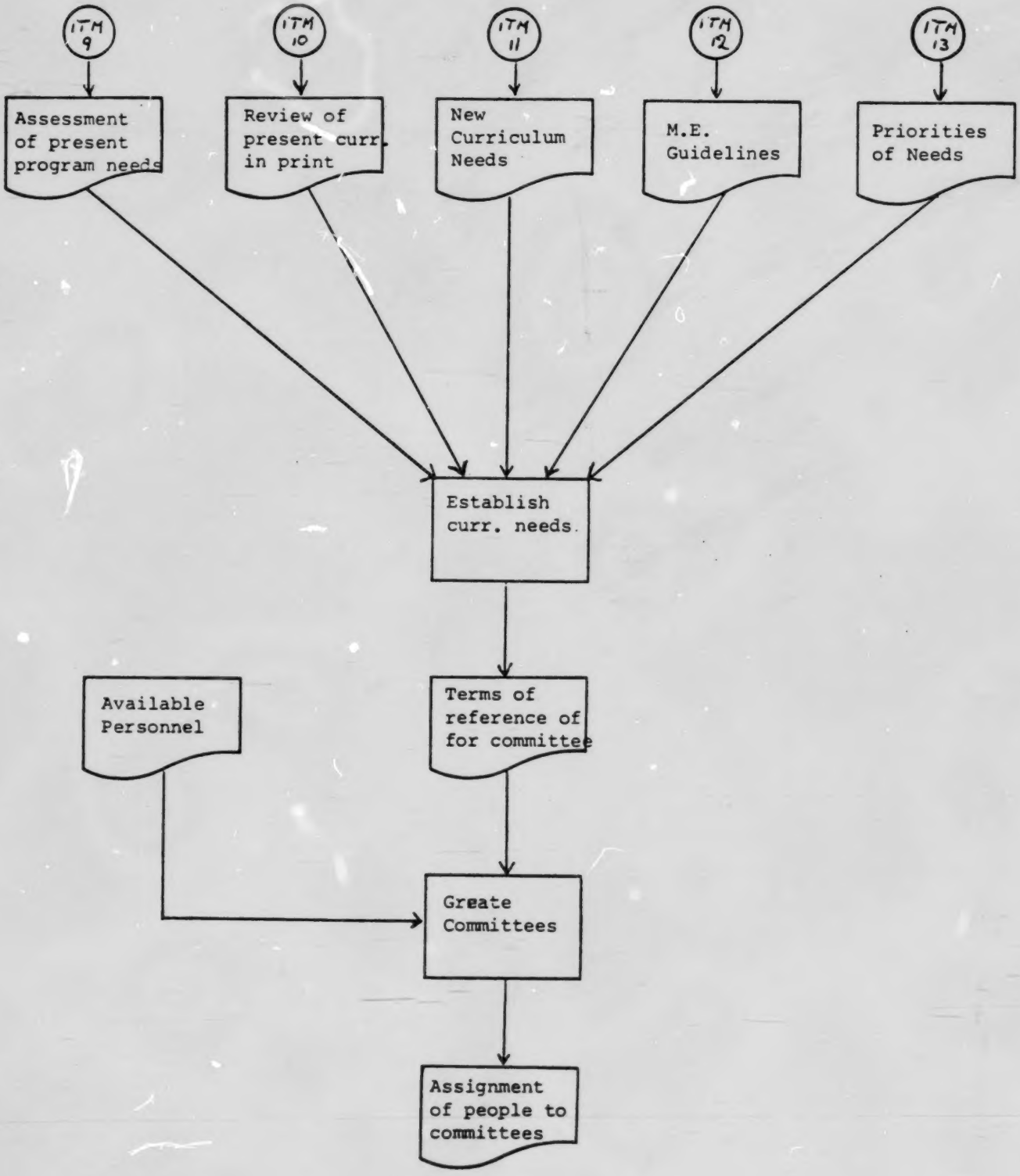
ITM 1
Enrol. proj. - 5 yr. - by areas
Bldg. plans - OMB Expected starting date - staging - housing depletion
Catholic pop. trend press. to support sep. bd.
Live births children 0-5
Dropout factor
Present Capacity in both sys.
Find out building needs
Building needs
Get board approval
Special Ed. needs - voc. needs, etc.
Community use of schools
Available firms
Educational specifications for new building
Principal appointed for new school
Appoint a princ. if a new school
Choose an architect
Educational Specifications
Create plans
Building plans approved
Buy Site
Build

D2,2,3/S01 STAFFING OF ELEMENTARY SCHOOLS



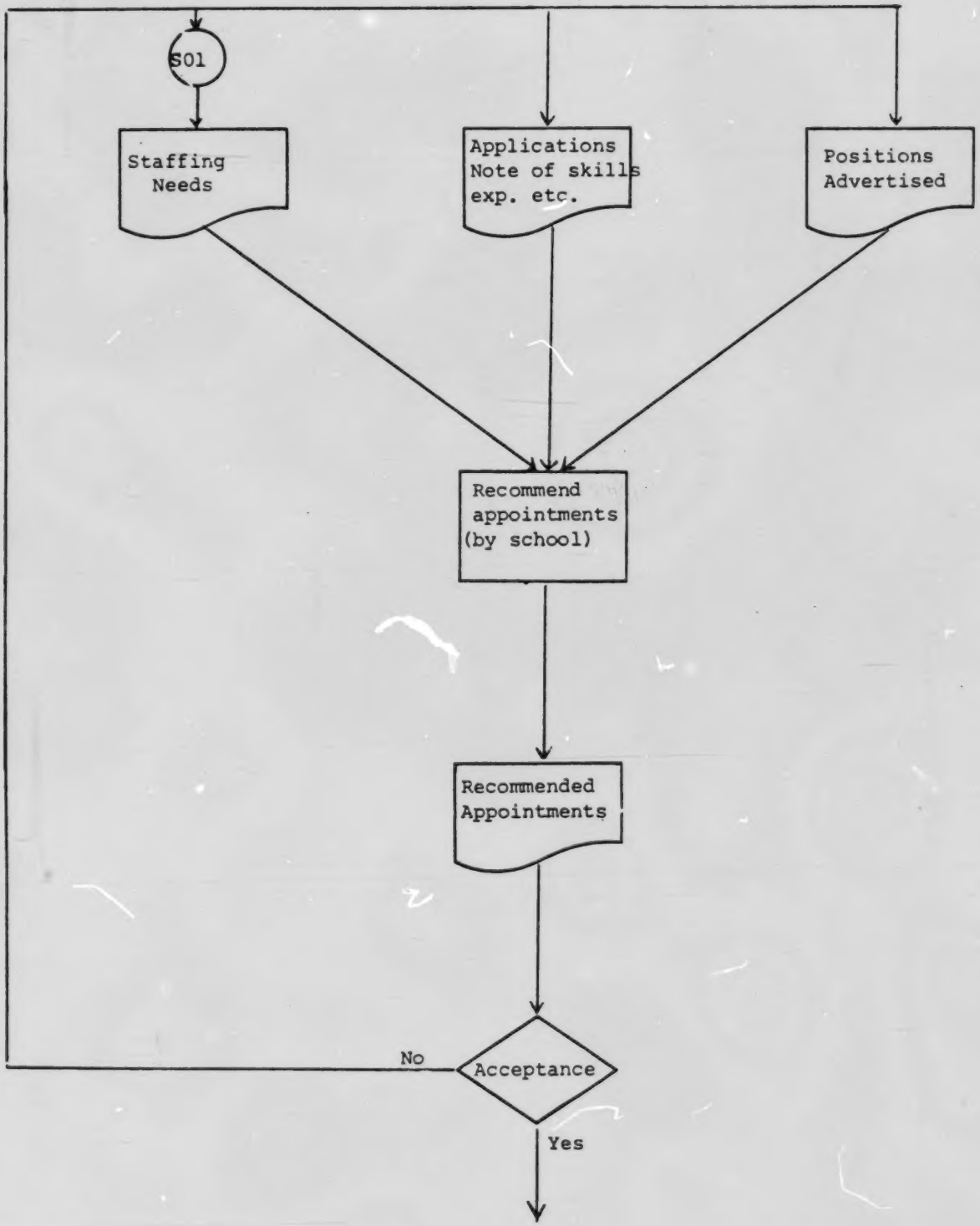
D1,2,2/SC4

CURRICULUM DEVELOPMENT

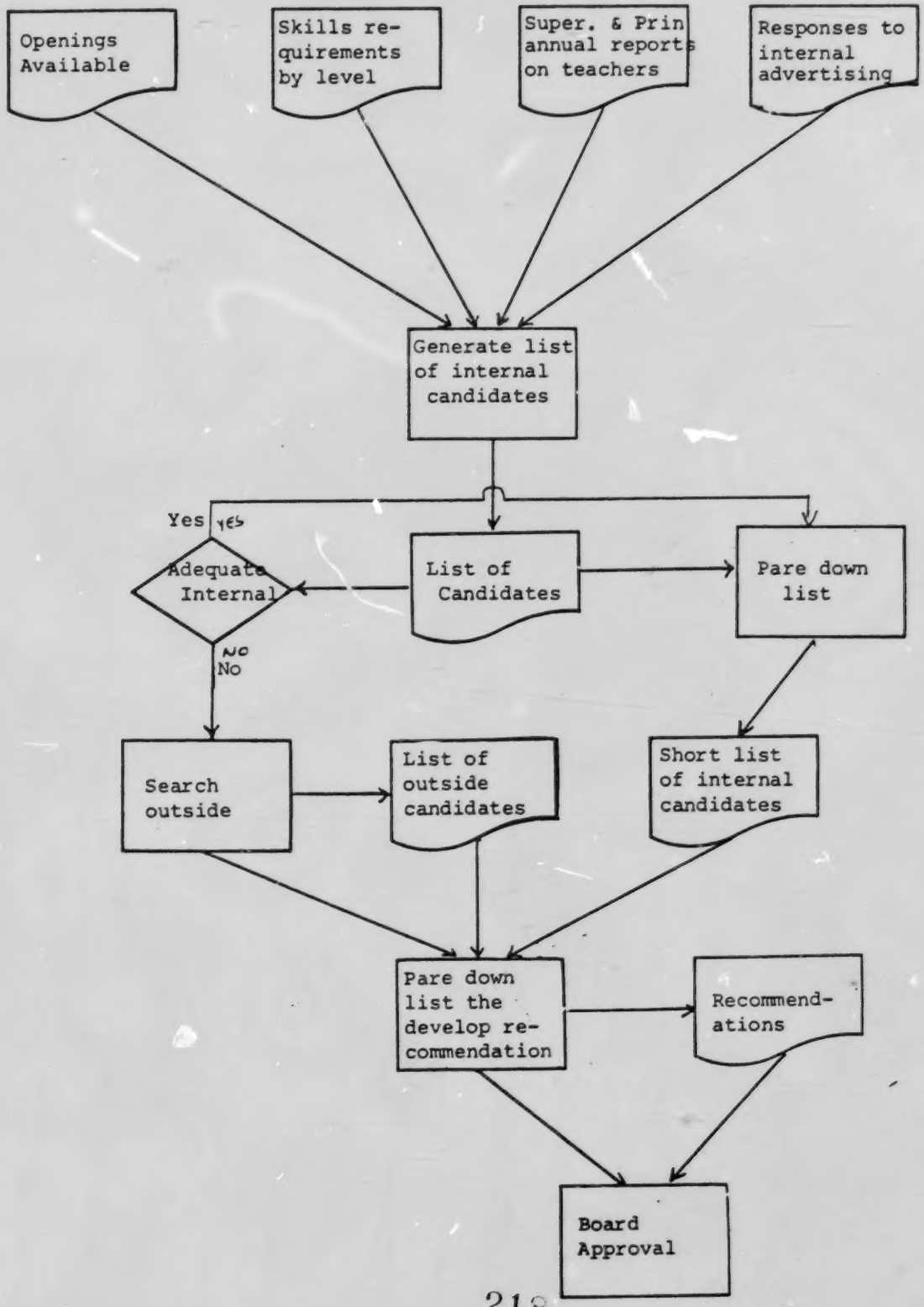


D2,2,1/S05

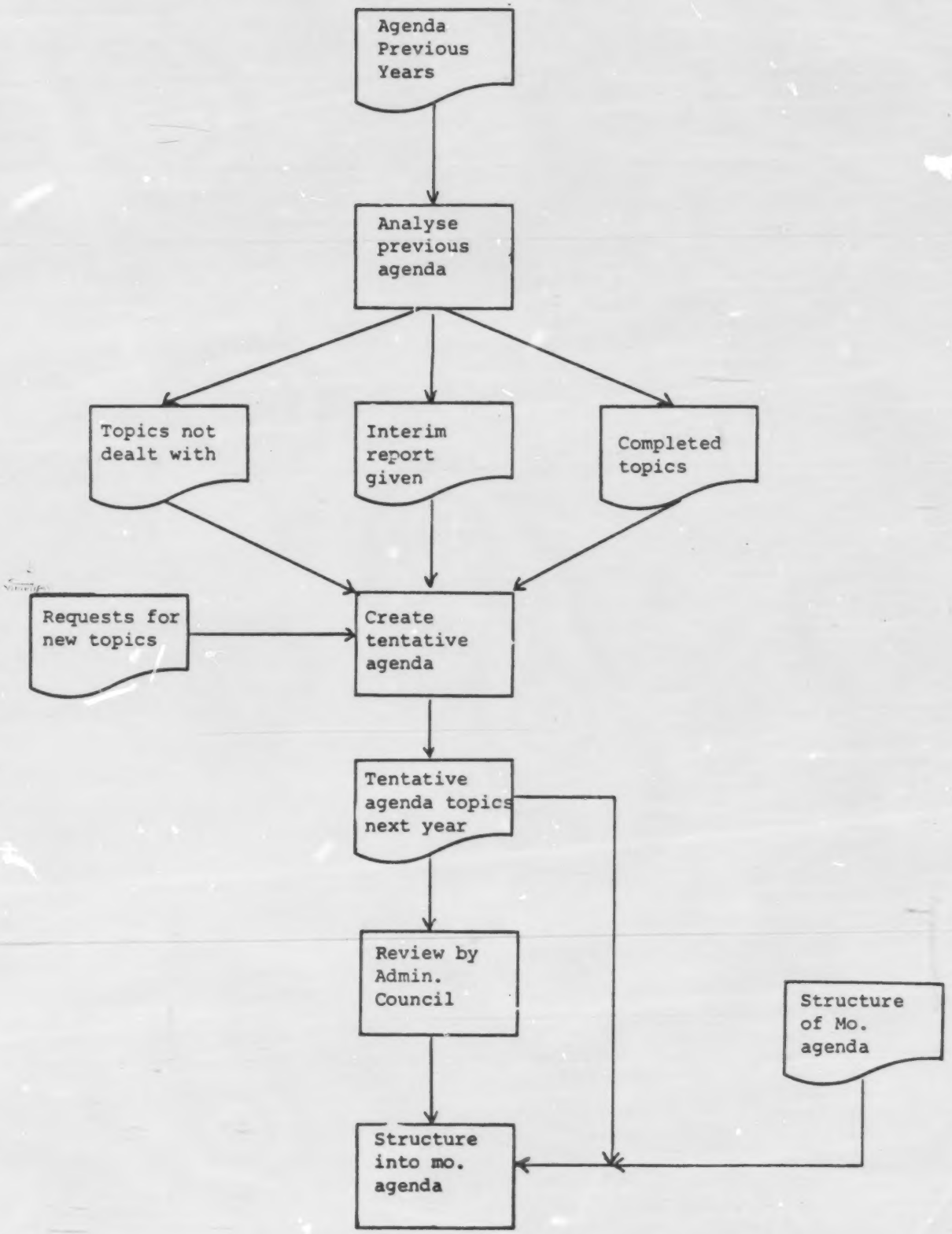
TEACHER HIRING



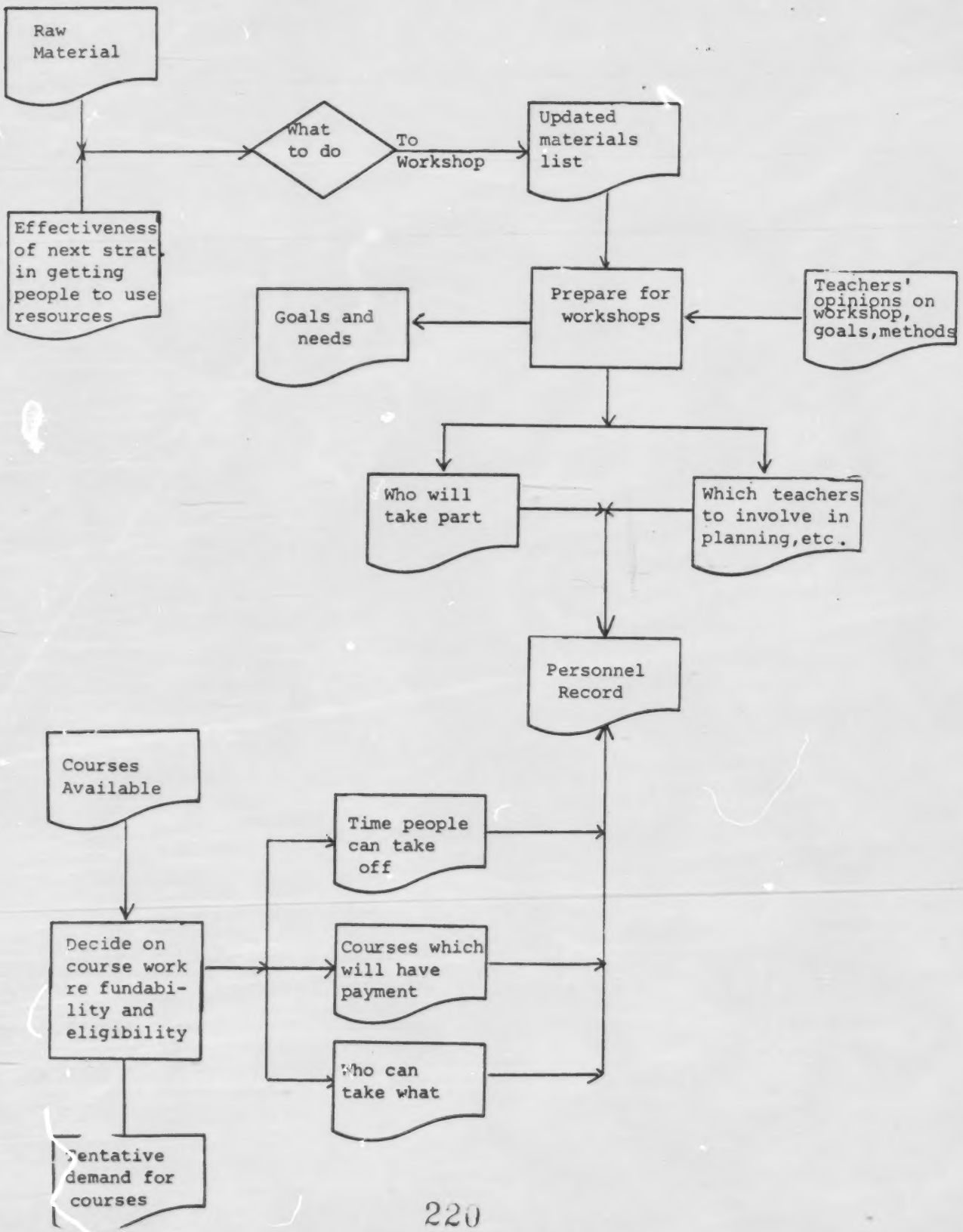
D2,1,6/S06 PROMOTIONS OF ELEMENTARY TEACHERS



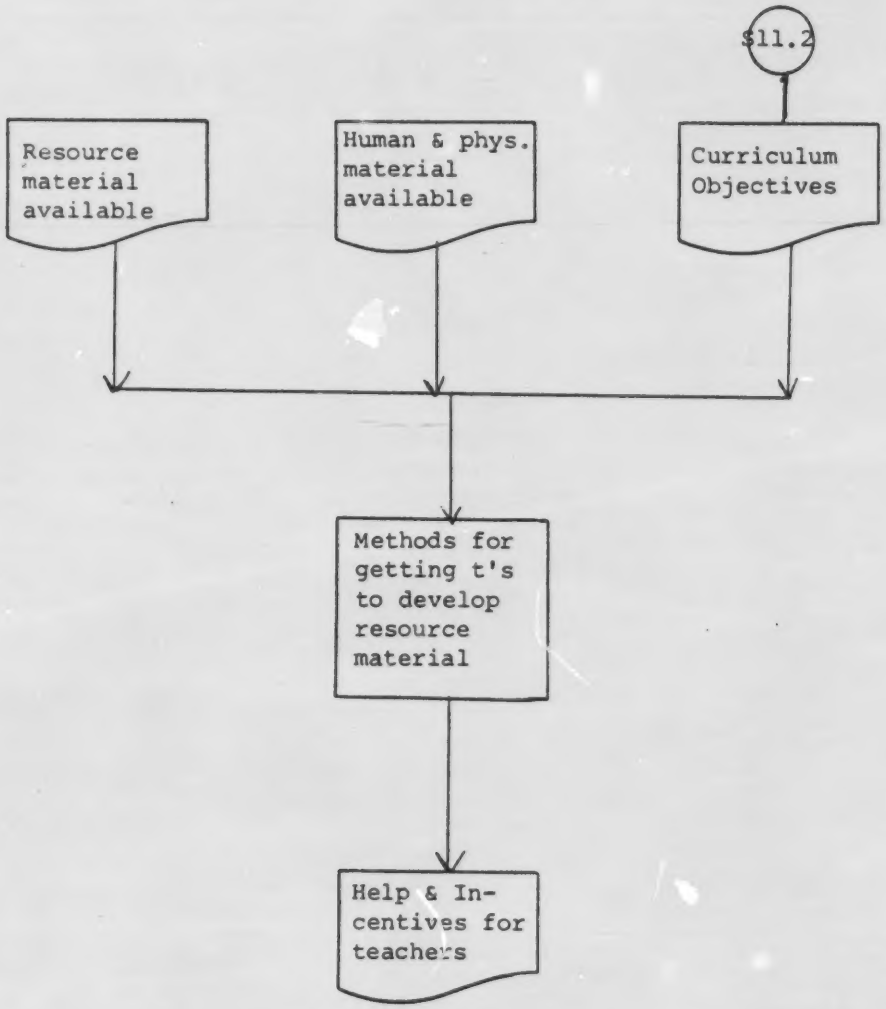
D3,1,2/S07 AGENDA ITEMS FOR EDUCATION COMMITTEE



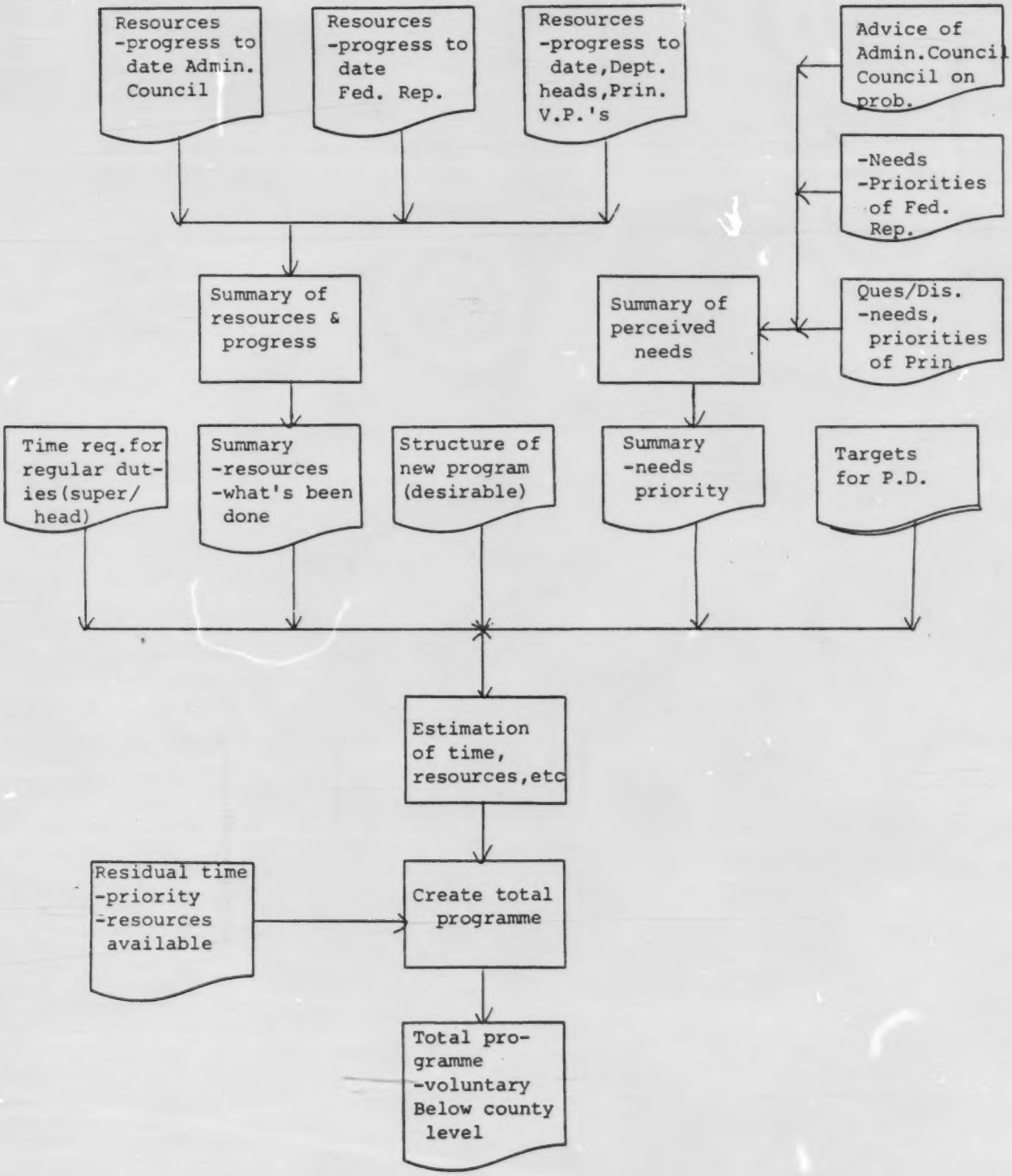
D2,3,9/S09(a) RESOURCE MATERIAL UTILIZATION/INVOLVEMENT


Raw Material
What to do
To Workshop
Updated materials list
Effectiveness of next strat. in getting people to use resources
Goals and needs
Prepare for workshops
Teachers' opinions on workshop, goals, methods
Who will take part
Which teachers to involve in planning, etc.
Personnel Record
Courses Available
Time people can take off
Decide on course work re fundability and eligibility
Courses which will have payment
Who can take what
Tentative demand for courses

D2,3,9/S09(b) ENCOURAGE DEVELOPMENT OF RESOURCE MATERIALS

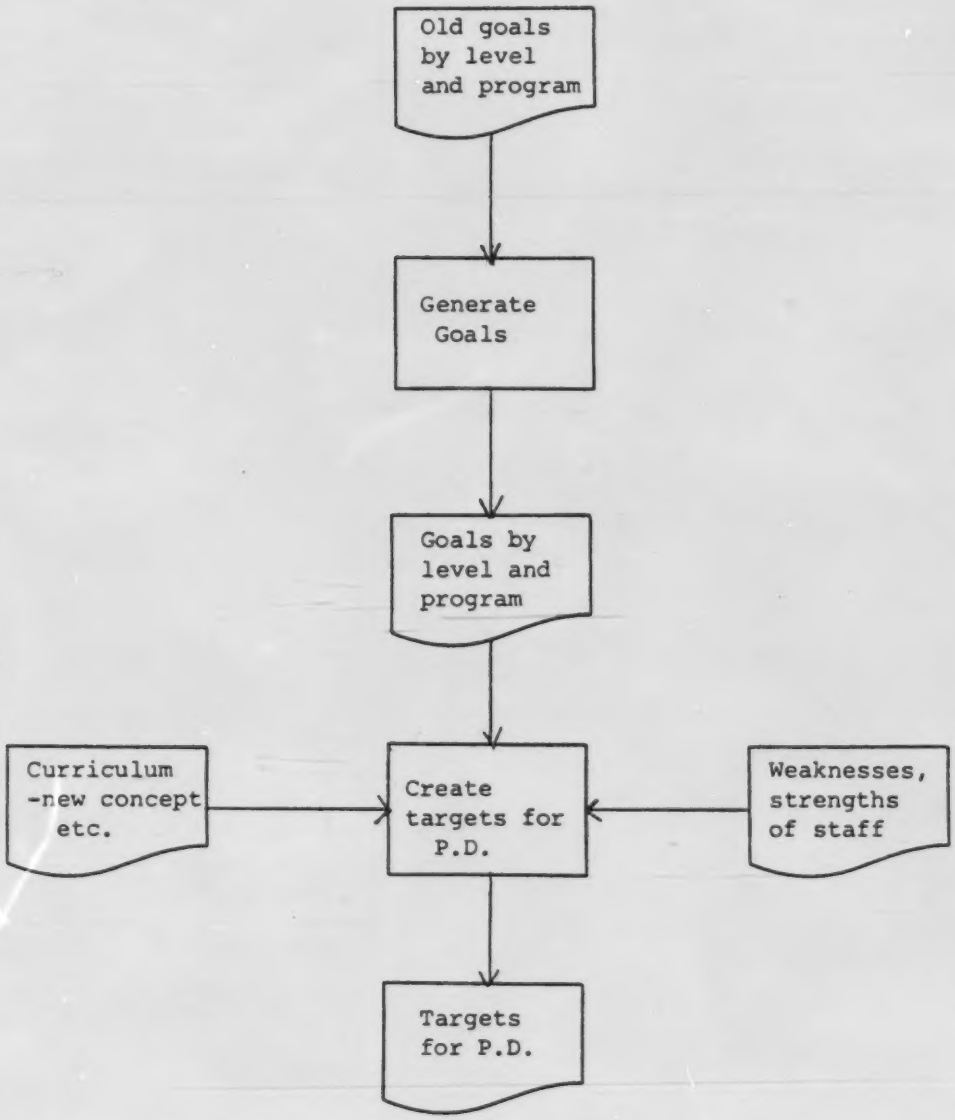

S11.2
Resource material available
Human & phys. material available
Curriculum Objectives
Methods for getting t's to develop resource material
Help & Incentives for teachers

D2,3,4/S11.1 PLANNING OF PROFESSIONAL DEVELOPMENT PROGRAMS

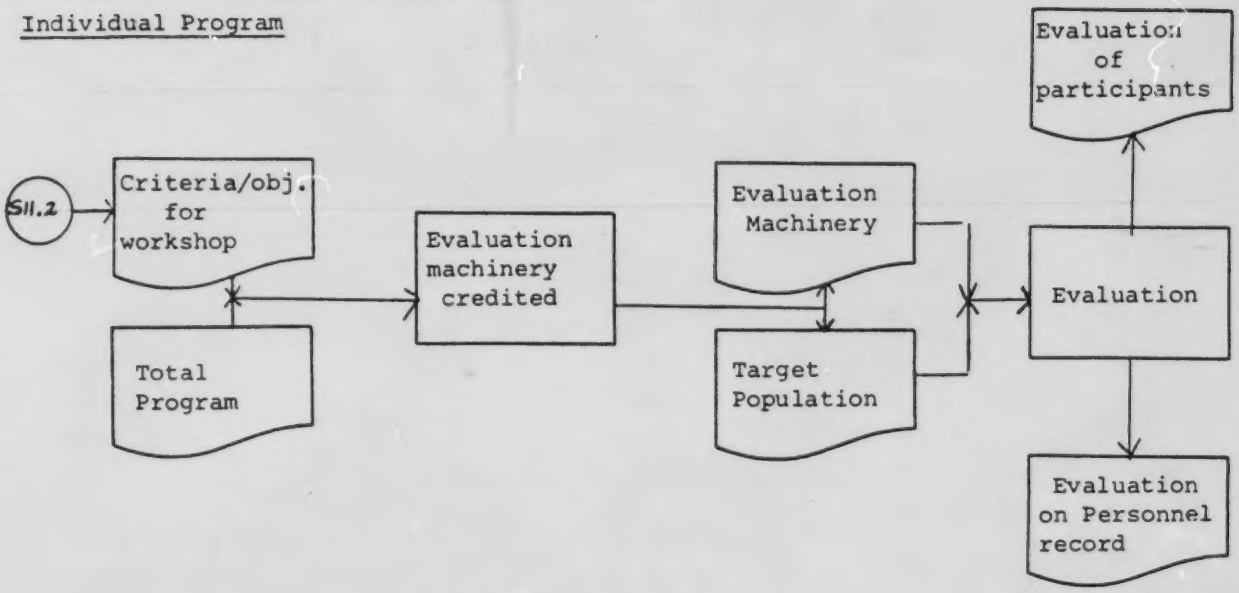

Resources -progress to date Admin. Council
Resources -progress to date Fed. Rep.
Resources -progress to date,Dept. heads,Prin. V.P.'s
Advice of Admin.Council Council on prob.
-Needs -Priorities of Fed. Rep.
Summary of resources & progress
Summary of perceived needs
Ques/Dis. -needs, priorities of Prin.
Time req.for regular duties(super/ head)
Summary -resources -what's been done
Structure of new program (desirable)
Summary -needs priority
Targets for P.D.
Estimation of time, resources,etc
Residual time -priority -resources available
Create total programme
Total programme -voluntary Below county level

D2,3,1/S11.2

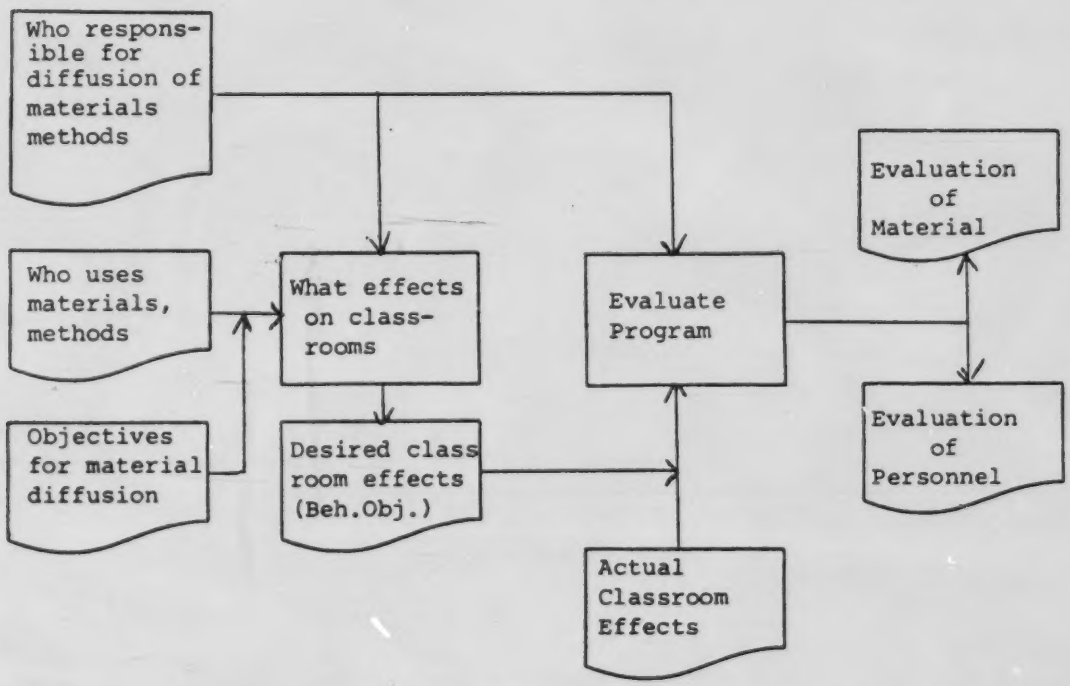
OBJECTIVES FOR PROFESSIONAL DEVELOPMENT PROGRAM


Old goals by level and program
Generate Goals
Goals by level and program
Curriculum -new concept etc.
Create targets for P.D.
Weaknesses, strengths of staff
Targets for P.D.

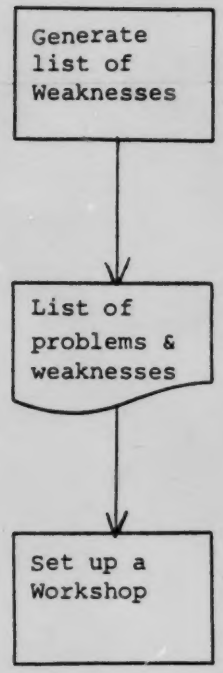
Individual Program



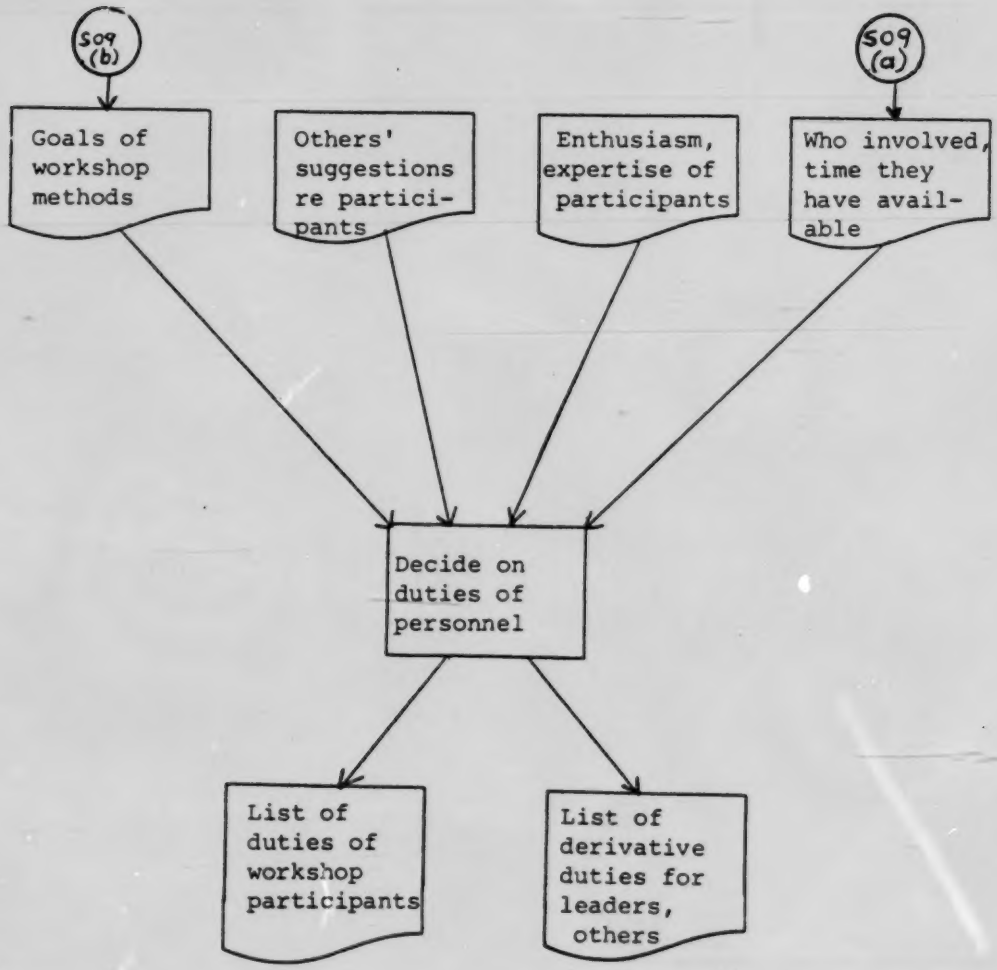
County Level



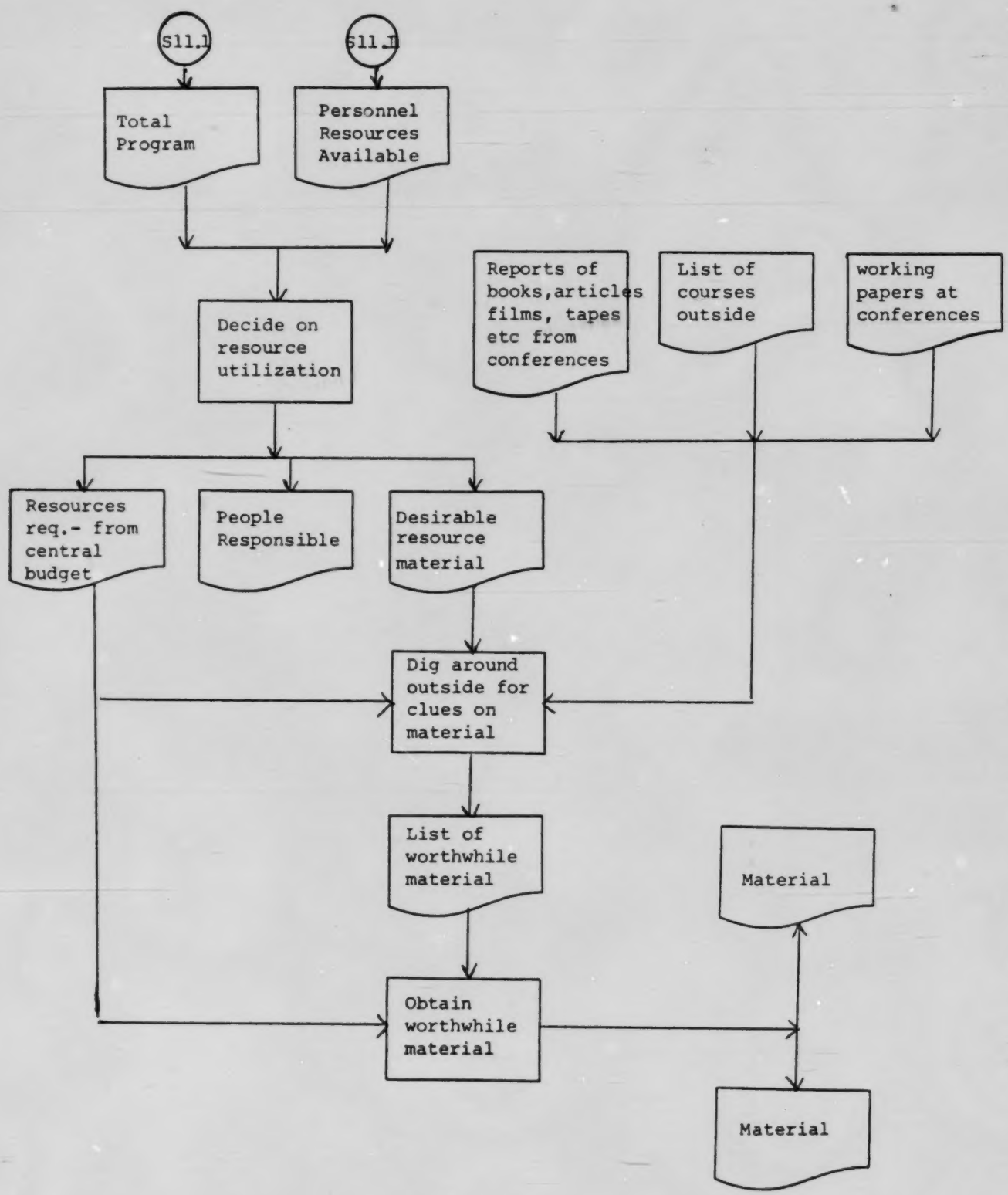
D2,1,7/S11.4 CO-ORDINATION & SUPERVISION OF PROFESSIONAL DEVELOPMENT



D2,3,10/S11.5 DISTRIBUTION OF PROFESSIONAL DEVELOPMENT WORKLOAD

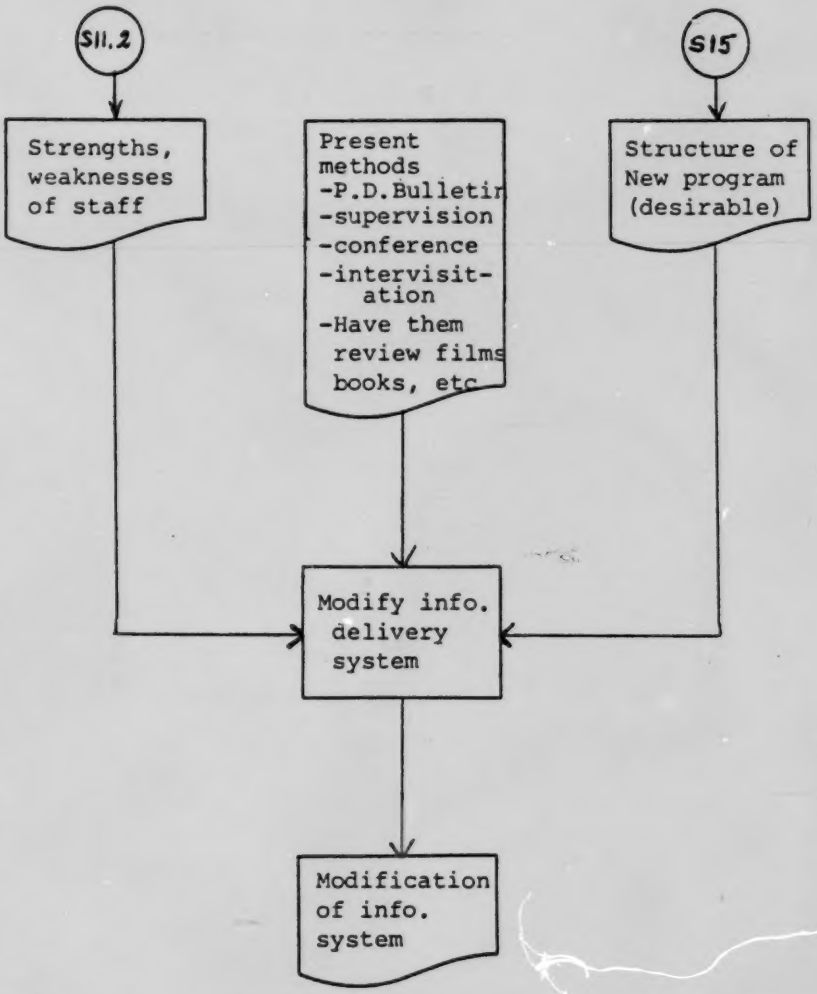

S09 (b)
S09 (a)
Goals of workshop methods
Others' suggestions re participants
Enthusiasm, expertise of participants
Who involved, time they have available
Decide on duties of personnel
List of duties of workshop participants
List of derivative duties for leaders, others

D2,3,5/S12 RESOURCES FOR PROFESSIONAL DEVELOPMENT PROGRAMS

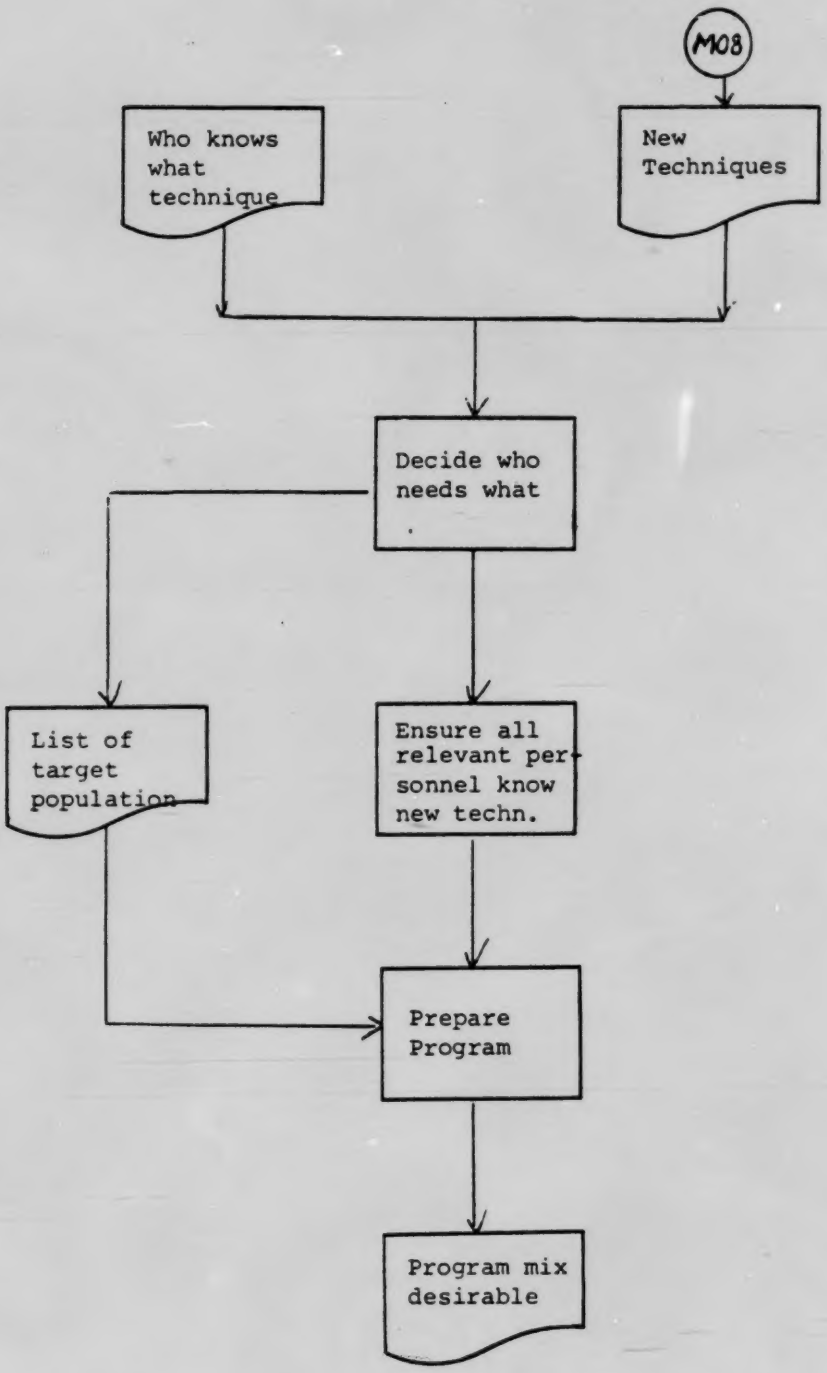


D2,3,7/S13.1

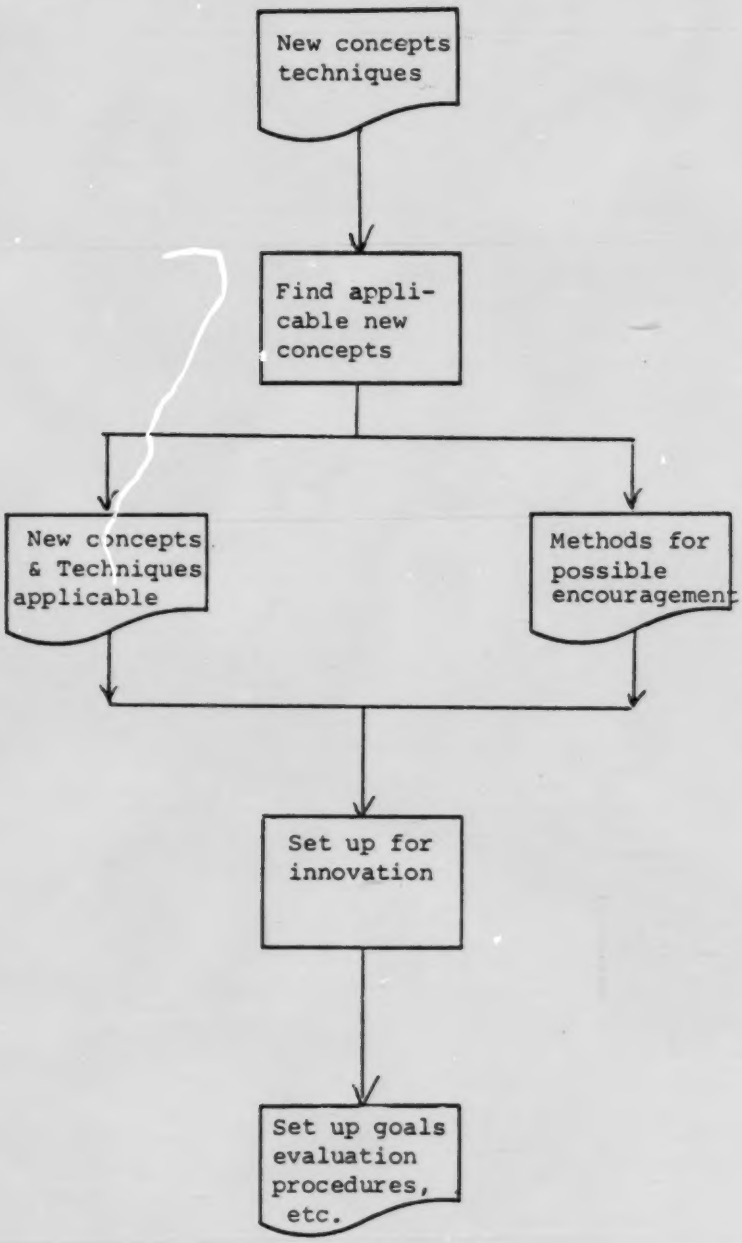
DISTRIBUTION OF INFORMATION ON PROFESSIONAL DEVELOPMENT TO TEACHERS



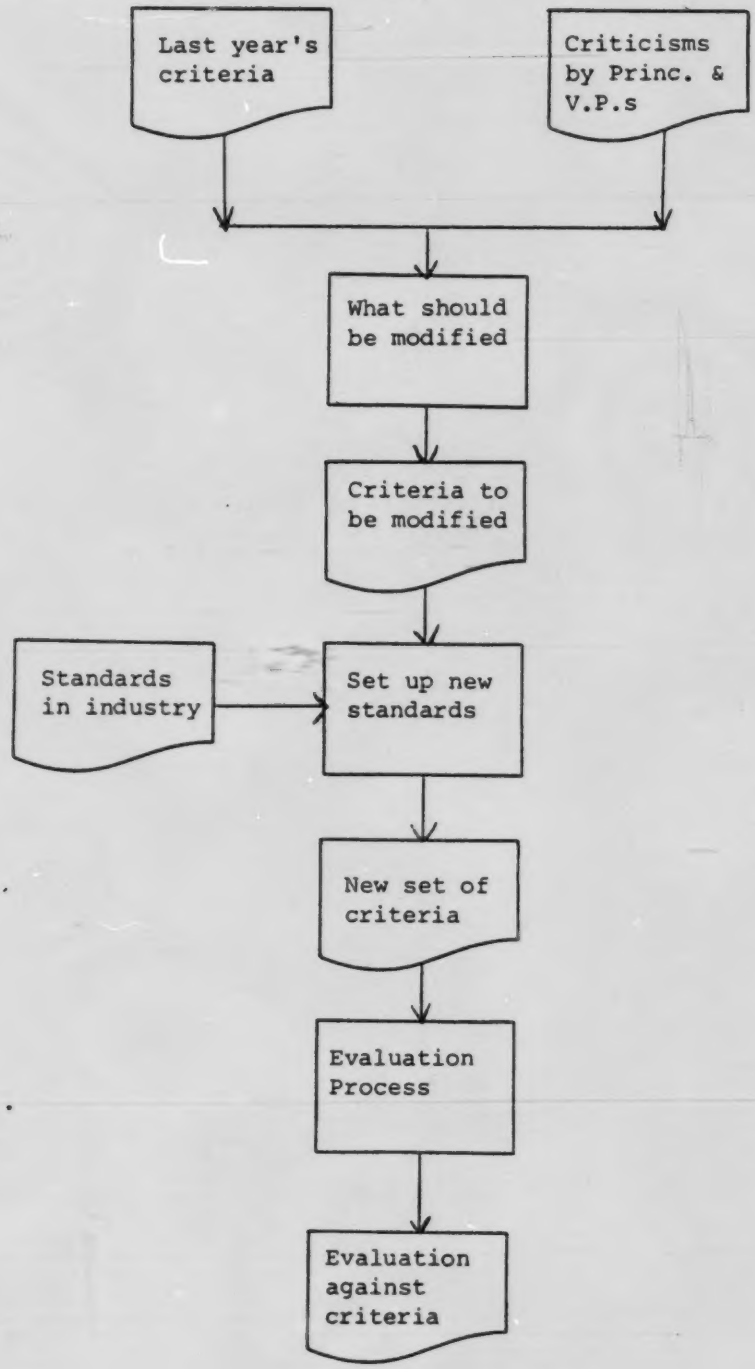
D2,3,7/S13.2 INFORMATION DISTRIBUTION ON INNOVATIVE TECHNIQUES TO TEACHERS



D2,3,11/S13.3 ENCOURAGE INNOVATION BY TEACHERS

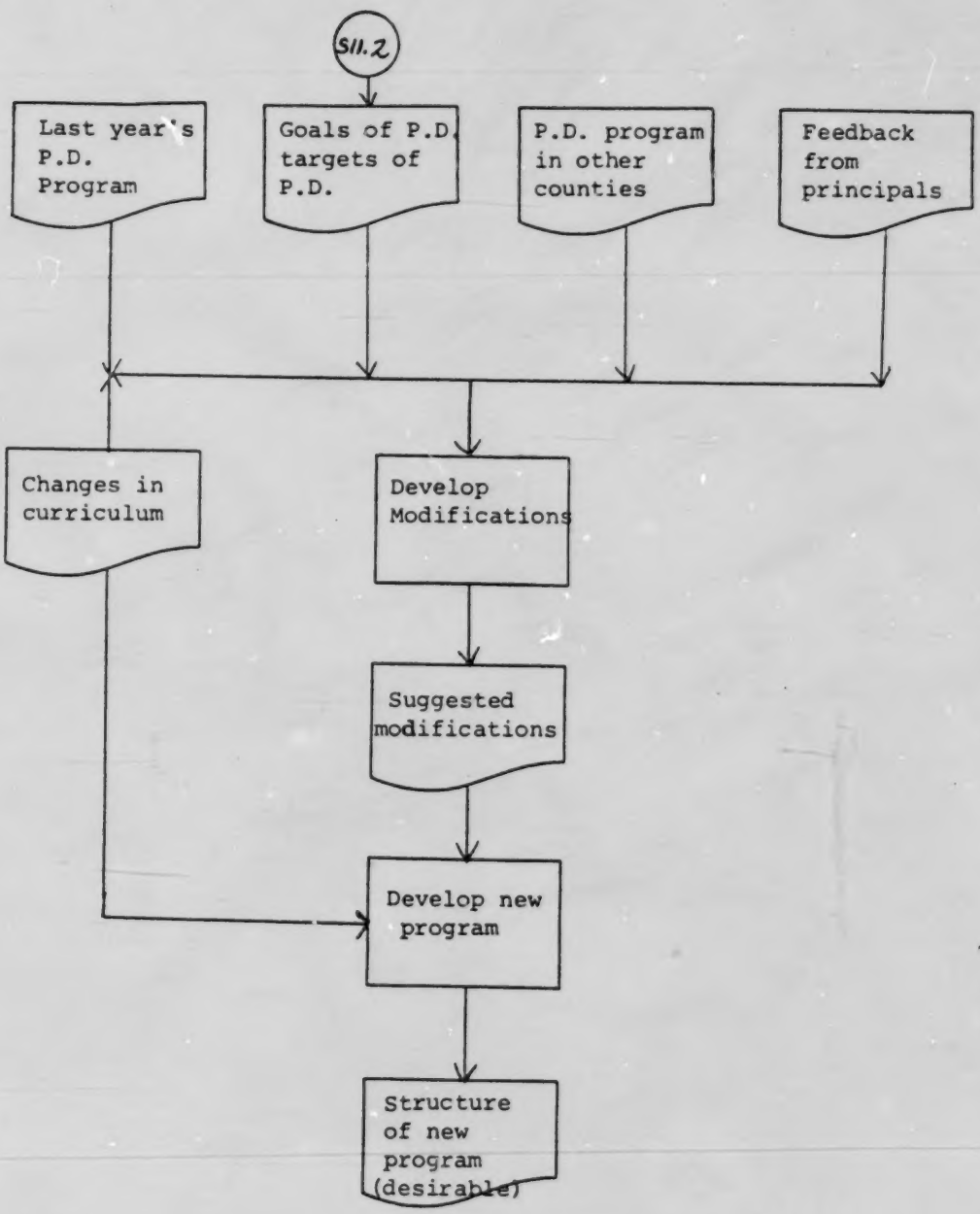

New concepts techniques
Find applicable new concepts
New concepts & Techniques applicable
Methods for possible encouragement
Set up for innovation
Set up goals evaluation procedures, etc.

D2,1,5/S14 PERFORMANCE CRITERIA FOR PRINCIPALS/VICE-PRINCIPALS

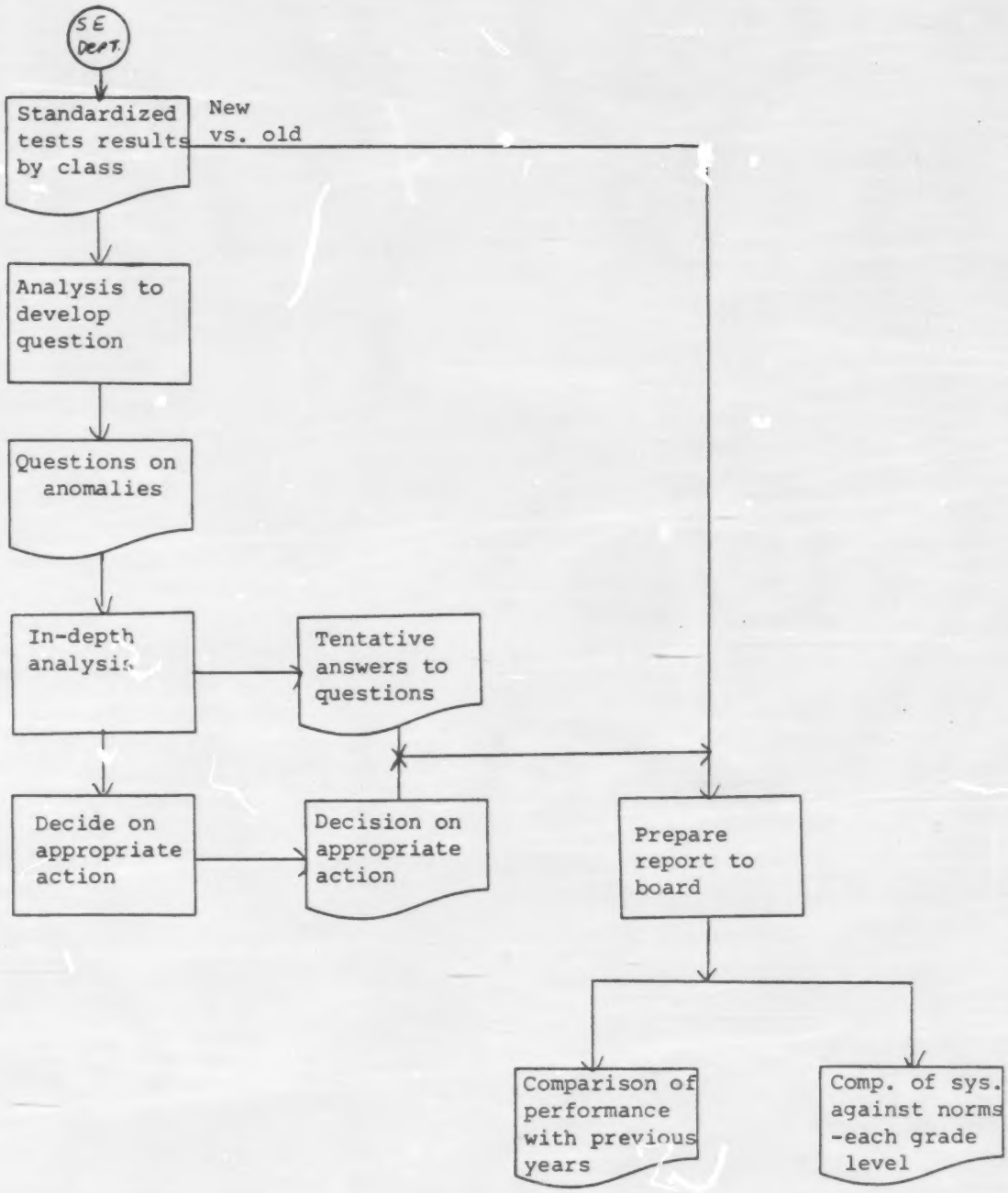


D1,2,7/SI5

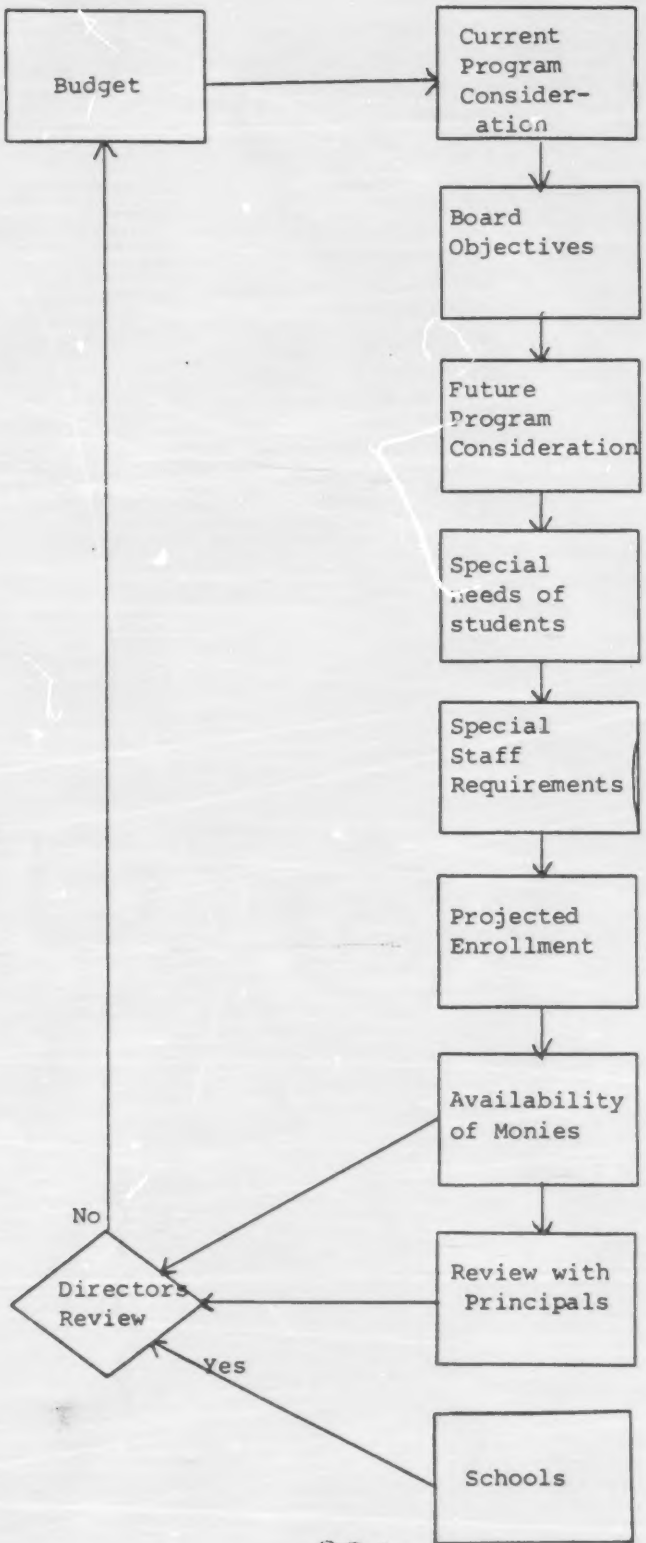
PROGRAM MODIFICATION



D1,2,6/S16 ASSESSMENT OF ACADEMIC PROGRAM

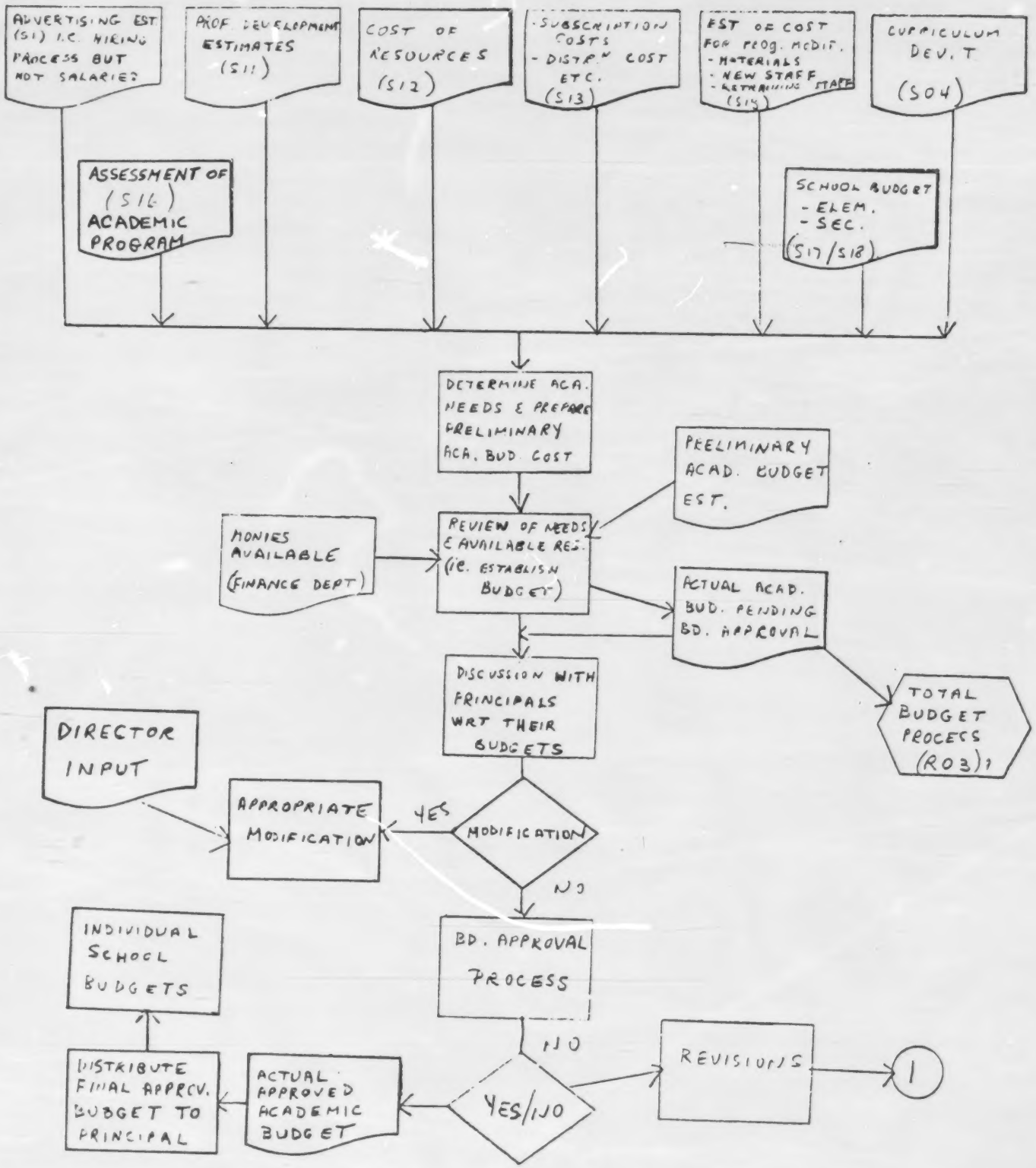

SE DEPT.
Standardized tests results by class
New vs. old
Analysis to develop question
Questions on anomalies
In-depth analysis
Tentative answers to questions
Decide on appropriate action
Decision on appropriate action
Prepare report to board
Comparison of performance with previous years
Comp. of sys. against norms -each grade level

D1,1,1/S17/S18 ACADEMIC BUDGET PROCESS

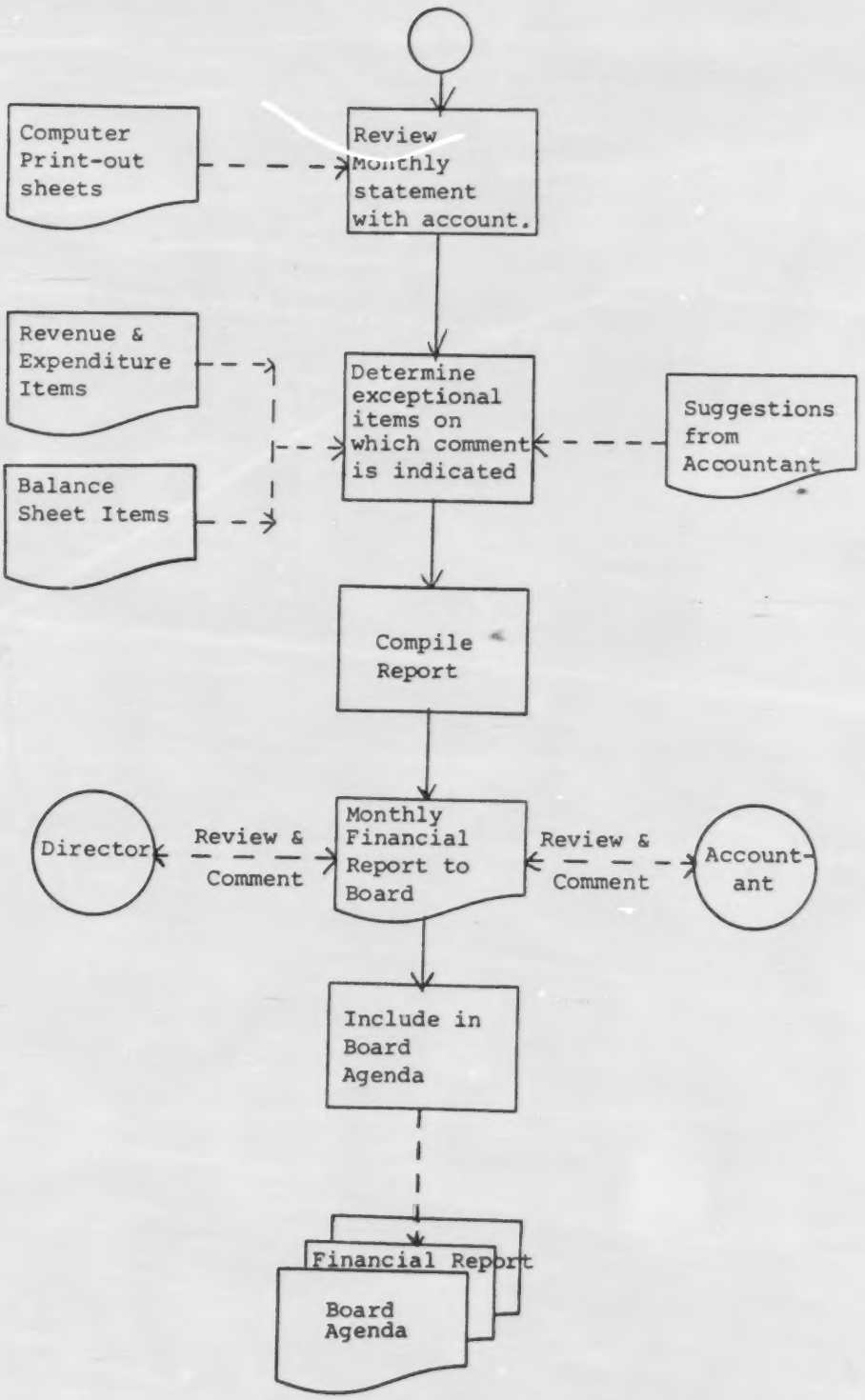


D1,1,2/S19

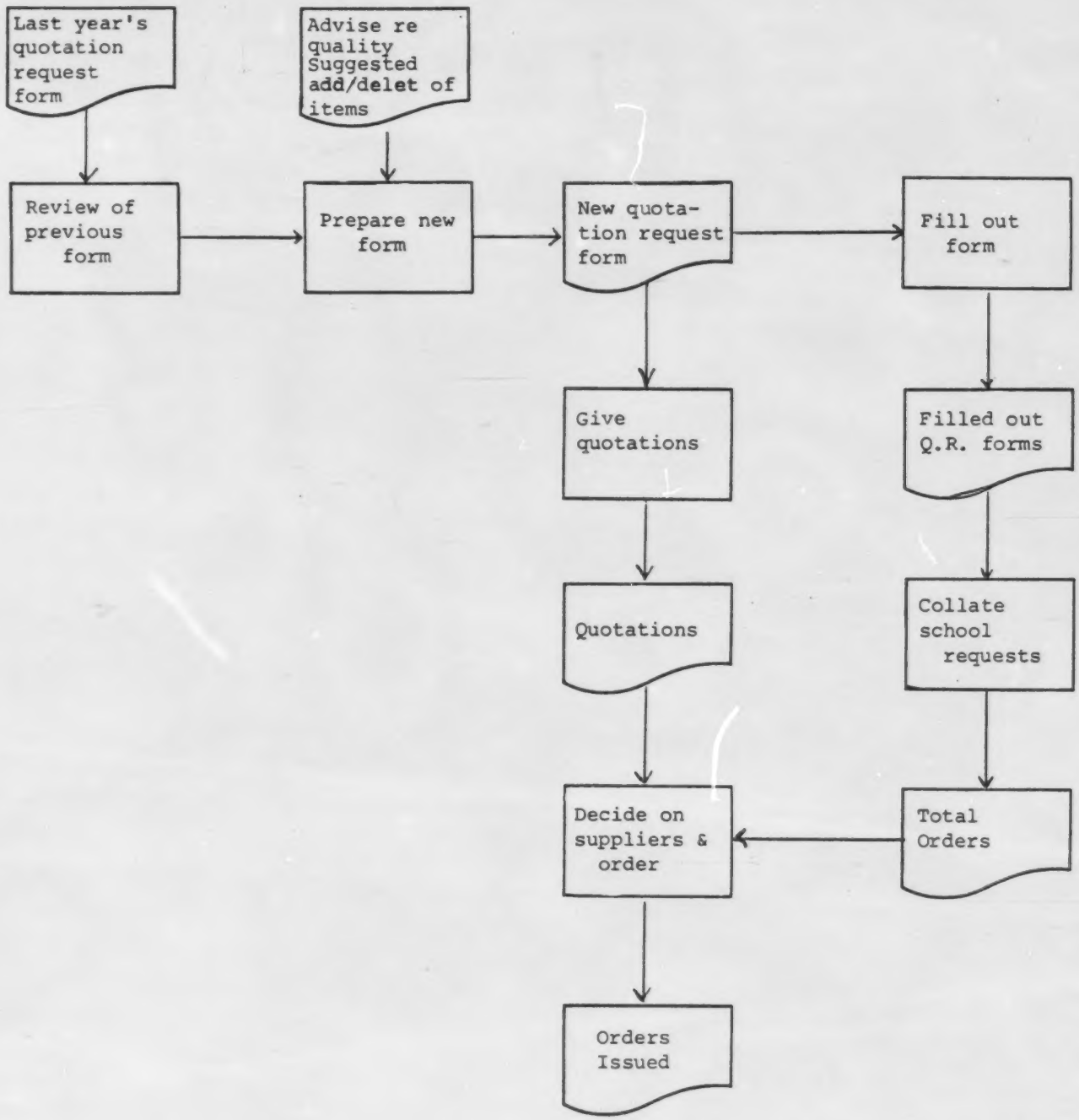
TOTAL ACADEMIC BUDGET


ADVERTISING EST (S1) I.C. HIRING PROCESS BUT NOT SALARIES
PROF. DEVELOPMENT ESTIMATES (S11)
COST OF RESOURCES (S12)
SUBSCRIPTION COSTS - DISTR.N COST ETC. (S13)
EST OF COST FOR PROG. MODIF. - MATERIALS - NEW STAFF - RETRAINING STAFF (S14)
CURRICULUM DEV. T (S04)
ASSESSMENT OF (S16) ACADEMIC PROGRAM
SCHOOL BUDGET - ELEM. - SEC. (S17/S18)
DETERMINE ACA. NEEDS & PREPARE PRELIMINARY ACA. BUD. COST
PRELIMINARY ACAD. BUDGET EST.
MONIES AVAILABLE (FINANCE DEPT)
REVIEW OF NEEDS & AVAILABLE RES. (ie. ESTABLISH BUDGET)
ACTUAL ACAD. BUD. PENDING BD. APPROVAL
DISCUSSION WITH PRINCIPALS WRT THEIR BUDGETS
TOTAL BUDGET PROCESS (R03)1
DIRECTOR INPUT
APPROPRIATE MODIFICATION
YES
MODIFICATION
NO
INDIVIDUAL SCHOOL BUDGETS
BD. APPROVAL PROCESS
NO
DISTRIBUTE FINAL APPROV. BUDGET TO PRINCIPAL
ACTUAL APPROVED ACADEMIC BUDGET
YES/NO
REVISIONS
1

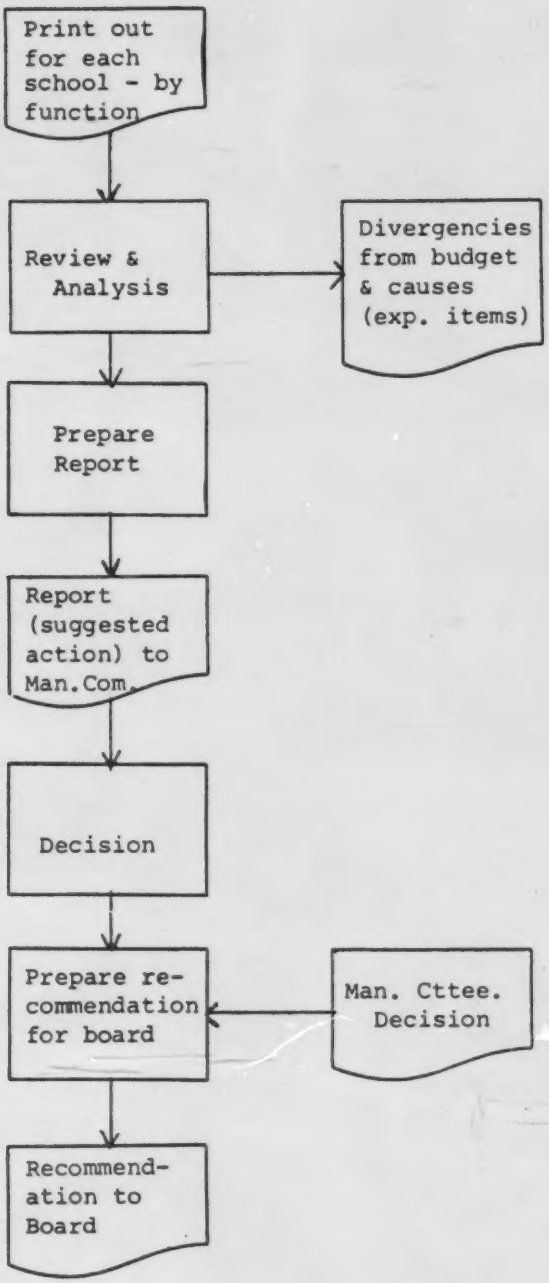
D3,1,3/B02/R21 MONTHLY FINANCIAL REPORTS TO BOARD

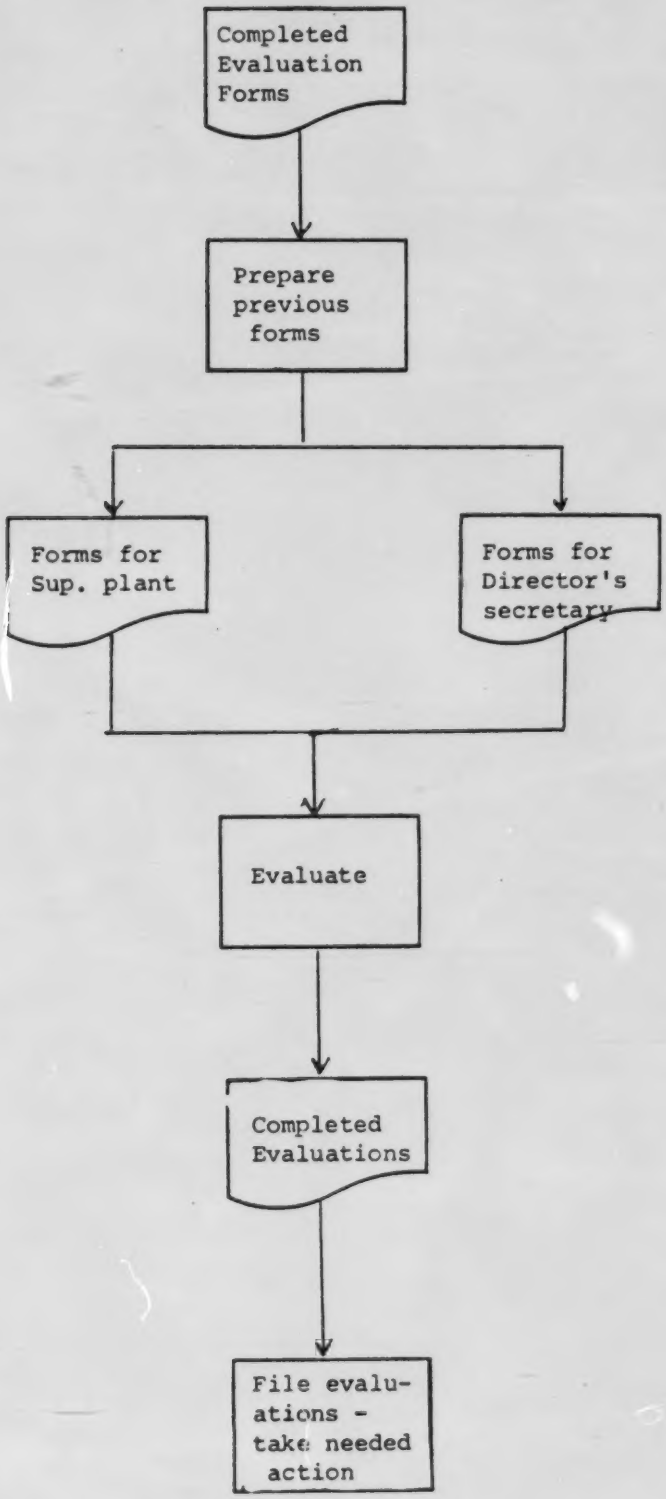


D1,1,4/B04 DETERMINATION AND REVIEW OF SUPPLIERS AND SPECIFICS FOR PURCHASE OF STANDARD SUPPLIES

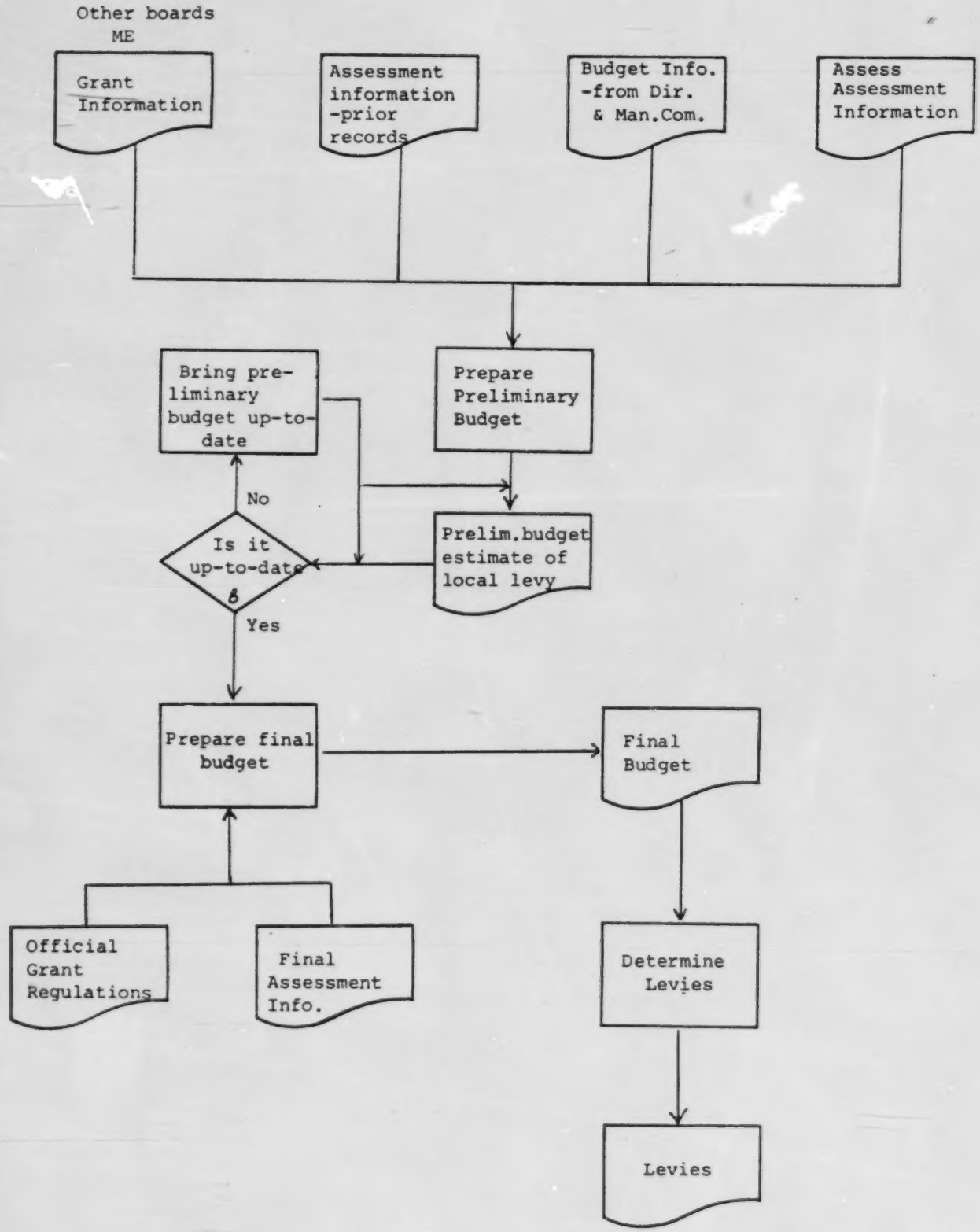


D1,1,3/B07 CONSIDERATION OF COST OF OPERATION AND RESULTANT DECISIONS RE REQUIRED ACTION

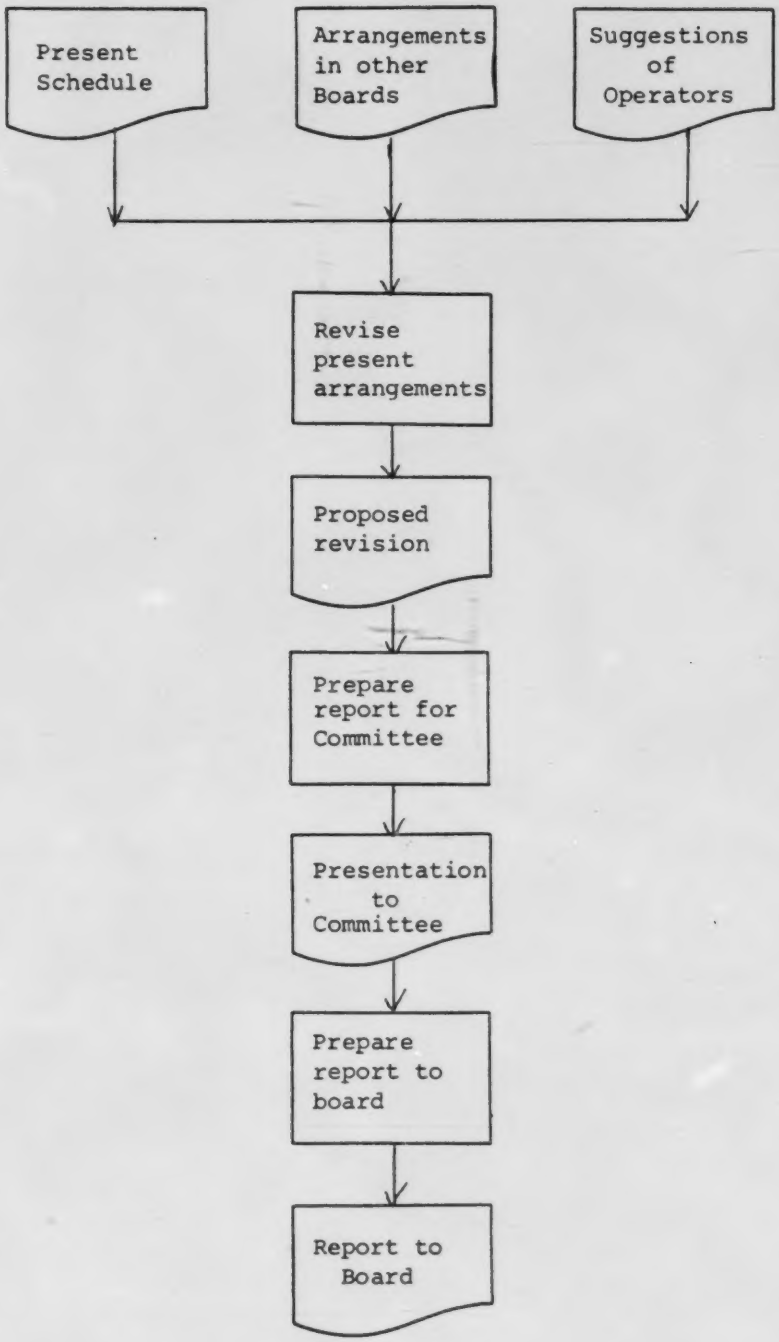

Print out for each school - by function
Review & Analysis
Divergencies from budget & causes (exp. items)
Prepare Report
Report (suggested action) to Man.Com.
Decision
Prepare re-commendation for board
Man. Cttee. Decision
Recommend-ation to Board


Completed Evaluation Forms
Prepare previous forms
Forms for Sup. plant
Forms for Director's secretary
Evaluate
Completed Evaluations
File evaluations - take needed action

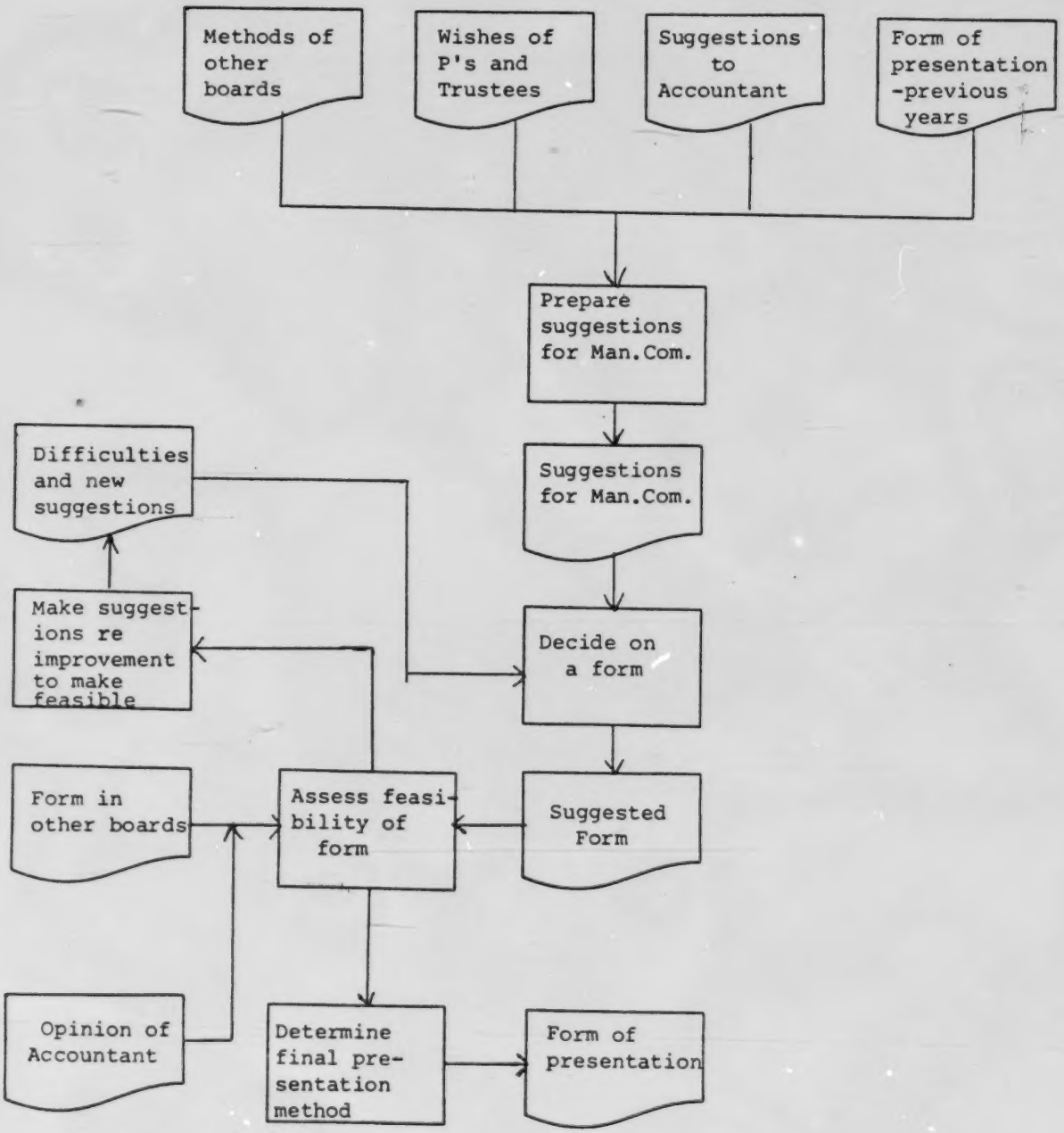
D1,1,5/B09· DETERMINATION OF LOCAL LEVIES FOR EDUCATION



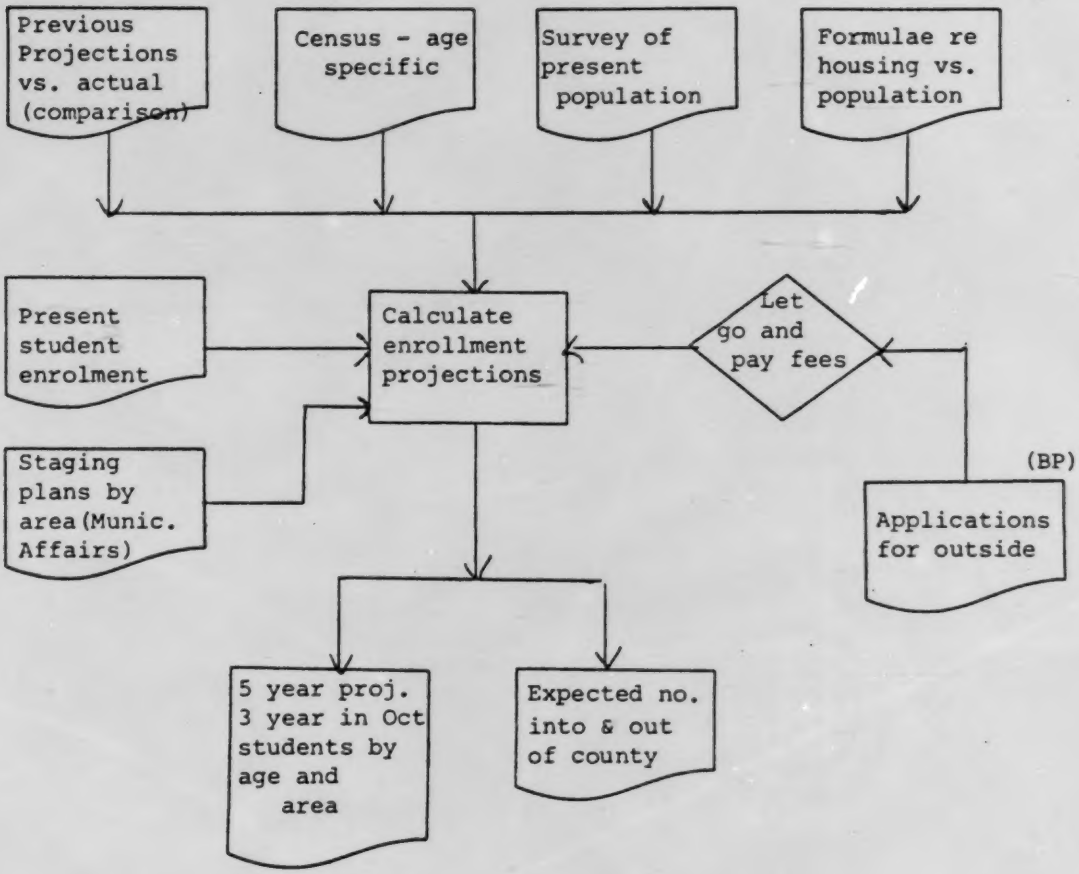
D4,1,1/B10 DETERMINATION OF TRANSPORTATION ARRANGEMENTS WITH BUS OPERATORS



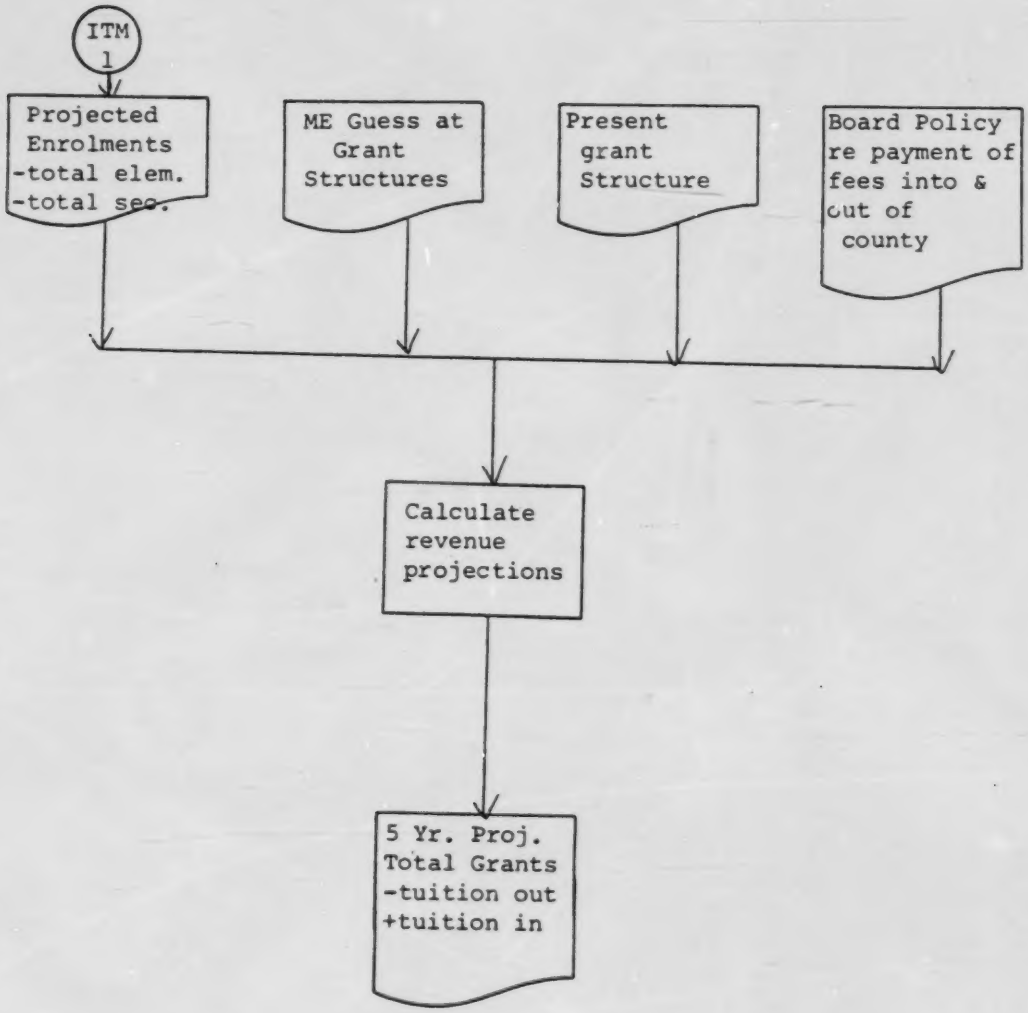
D3,1,1/B11 DETERMINATION OF METHOD OF BUDGET PRESENTATION



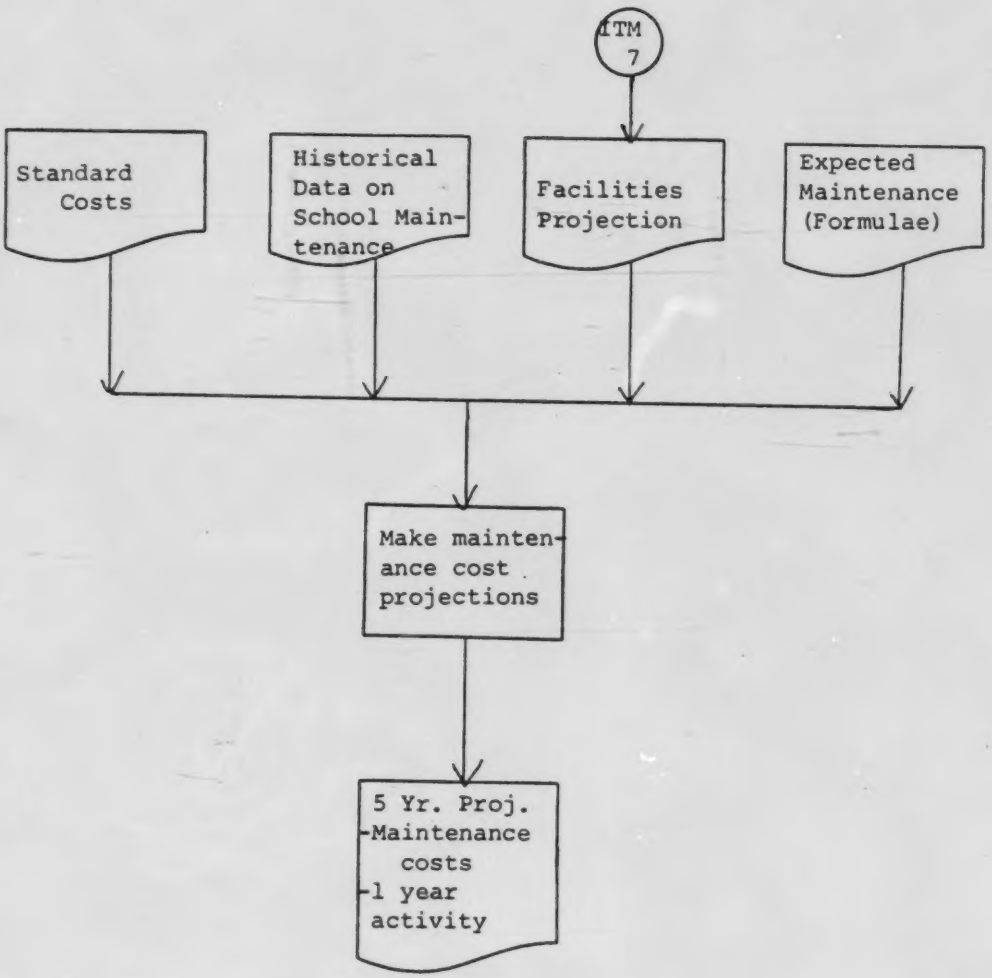
ITM 1 ENROLMENT PROJECTIONS (Twice Yearly)


Previous Projections vs. actual (comparison)
Census - age specific
Survey of present population
Formulae re housing vs. population
Present student enrolment
Calculate enrollment projections
Let go and pay fees
(BP)
Staging plans by area (Munic. Affairs)
Applications for outside
5 year proj. 3 year in Oct students by age and area
Expected no. into & out of county

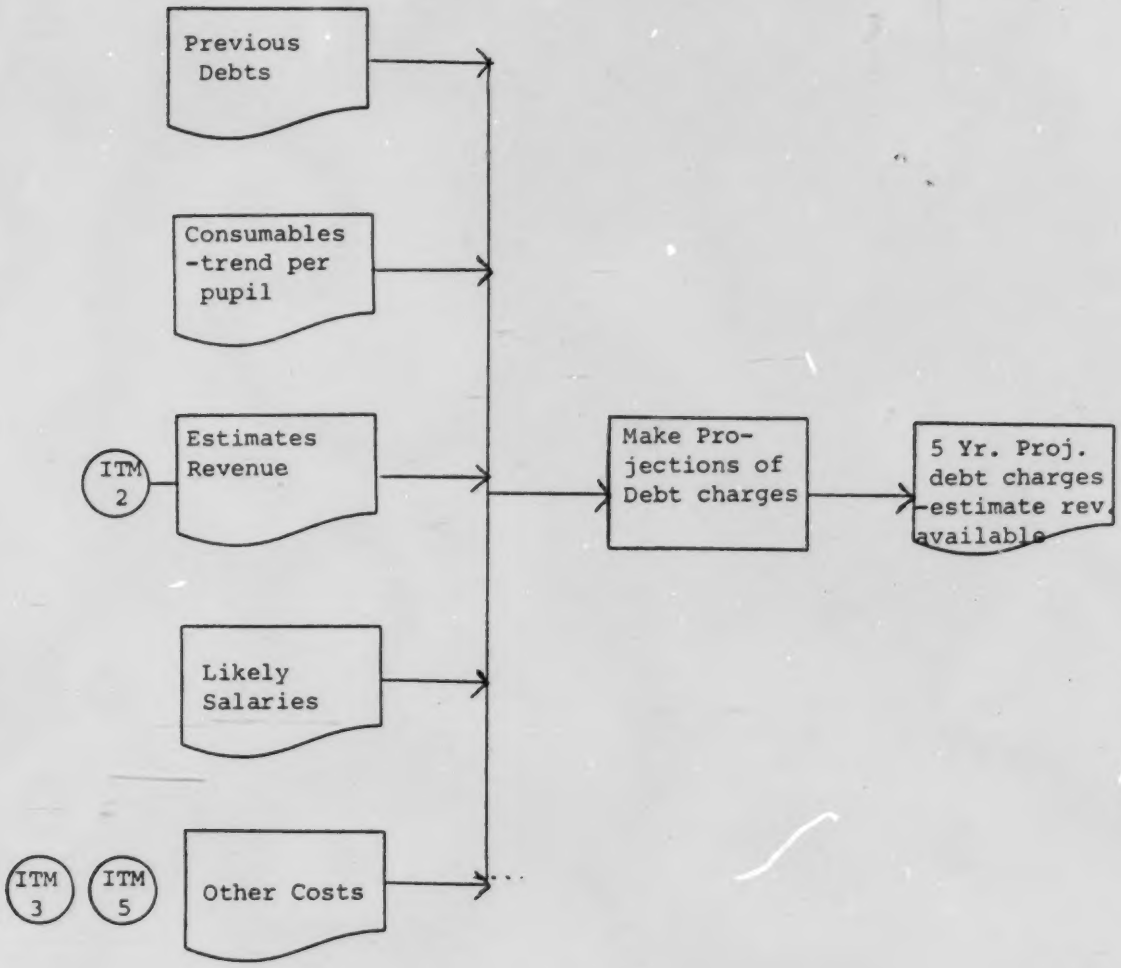
ITM 2 REVENUE PROJECTIONS


ITM 1
Projected Enrolments -total elem. -total sec.
ME Guess at Grant Structures
Present grant Structure
Board Policy re payment of fees into & out of county
Calculate revenue projections
5 Yr. Proj. Total Grants -tuition out +tuition in

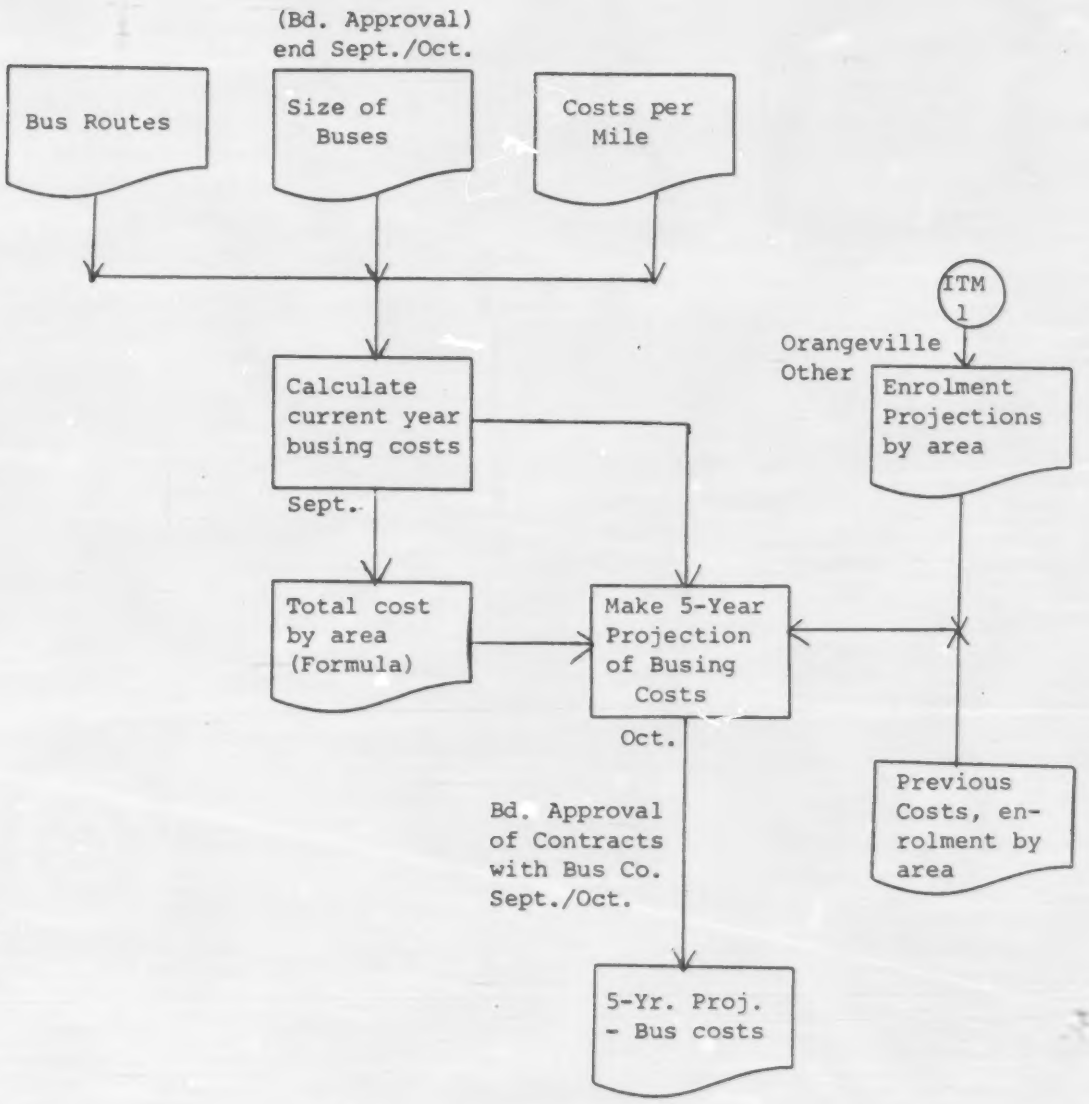
ITM 3 MAINTENANCE COST PROJECTIONS



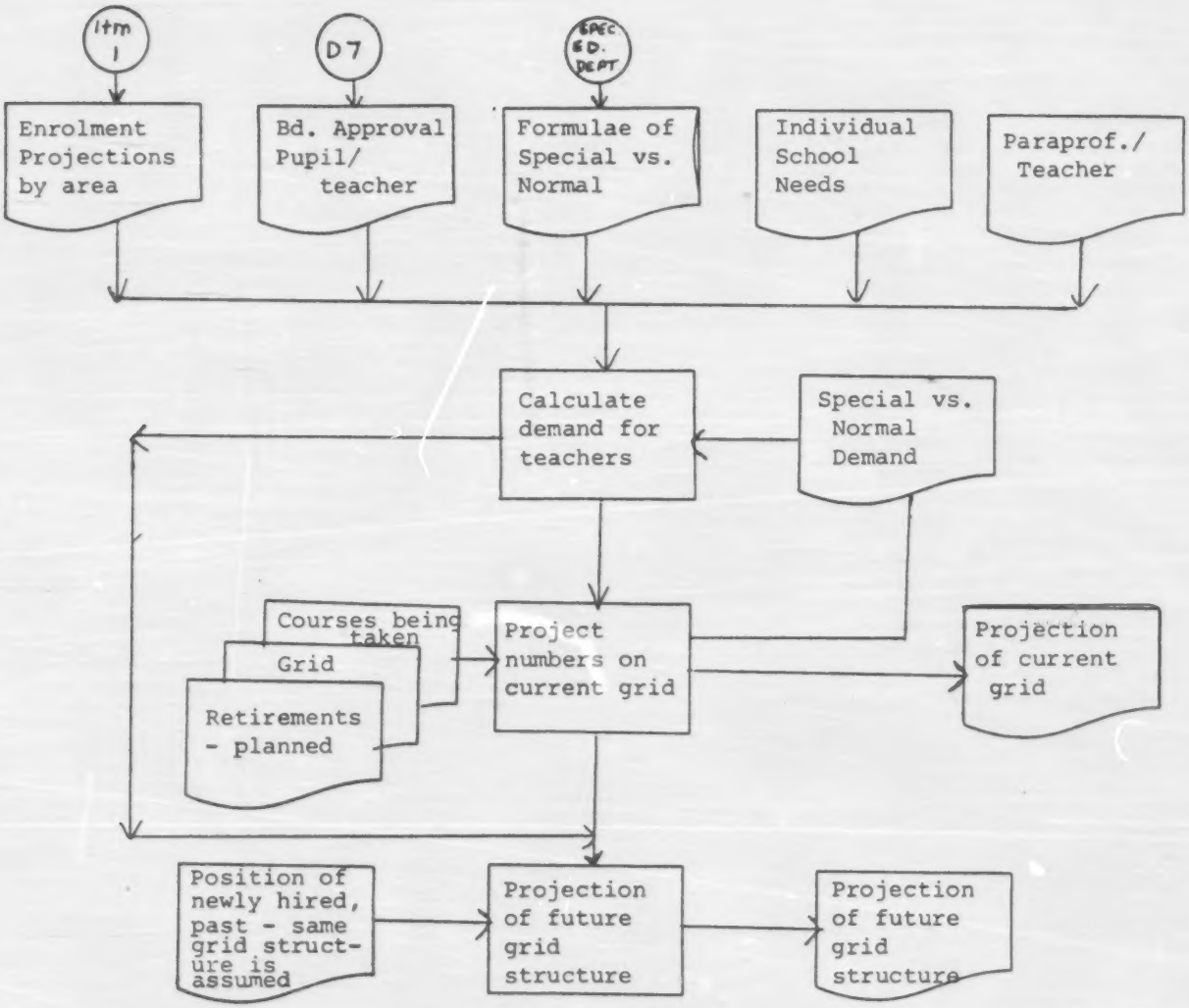
ITM 4 DEBT CHARGE PROJECTIONS (ANA)



ITM 5 BUSING COST PROJECTIONS

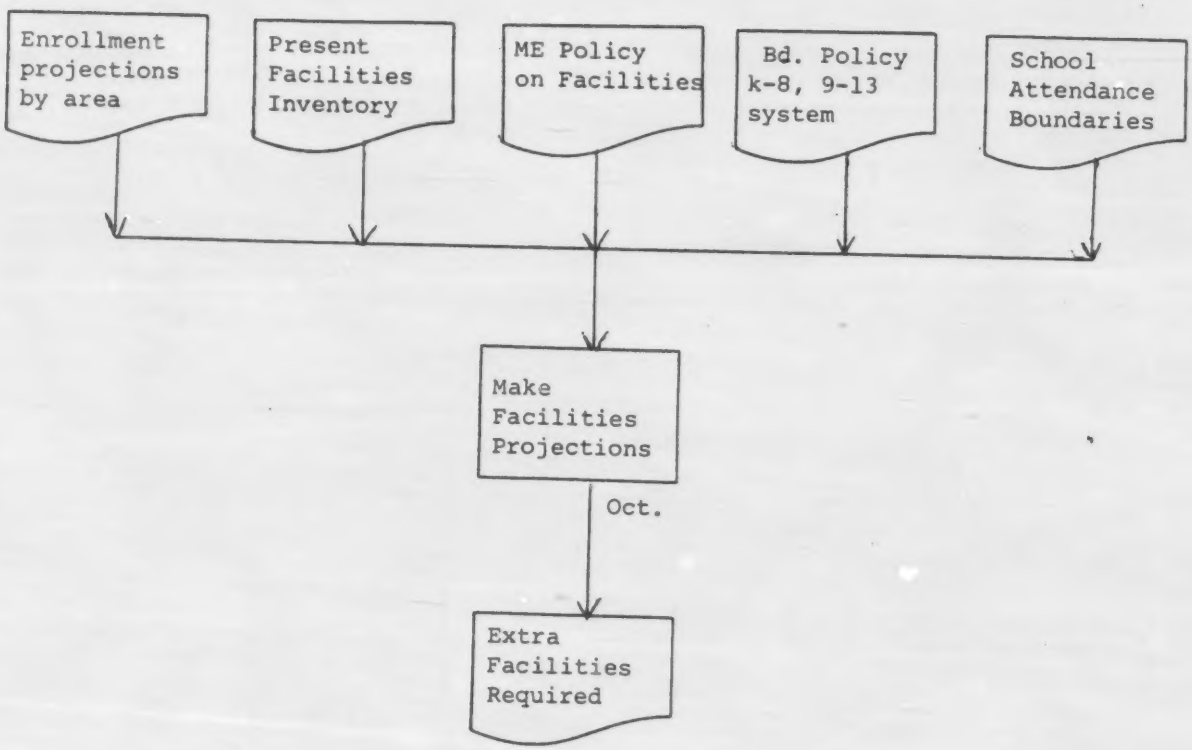


ITM 6 TEACHER PROJECTIONS

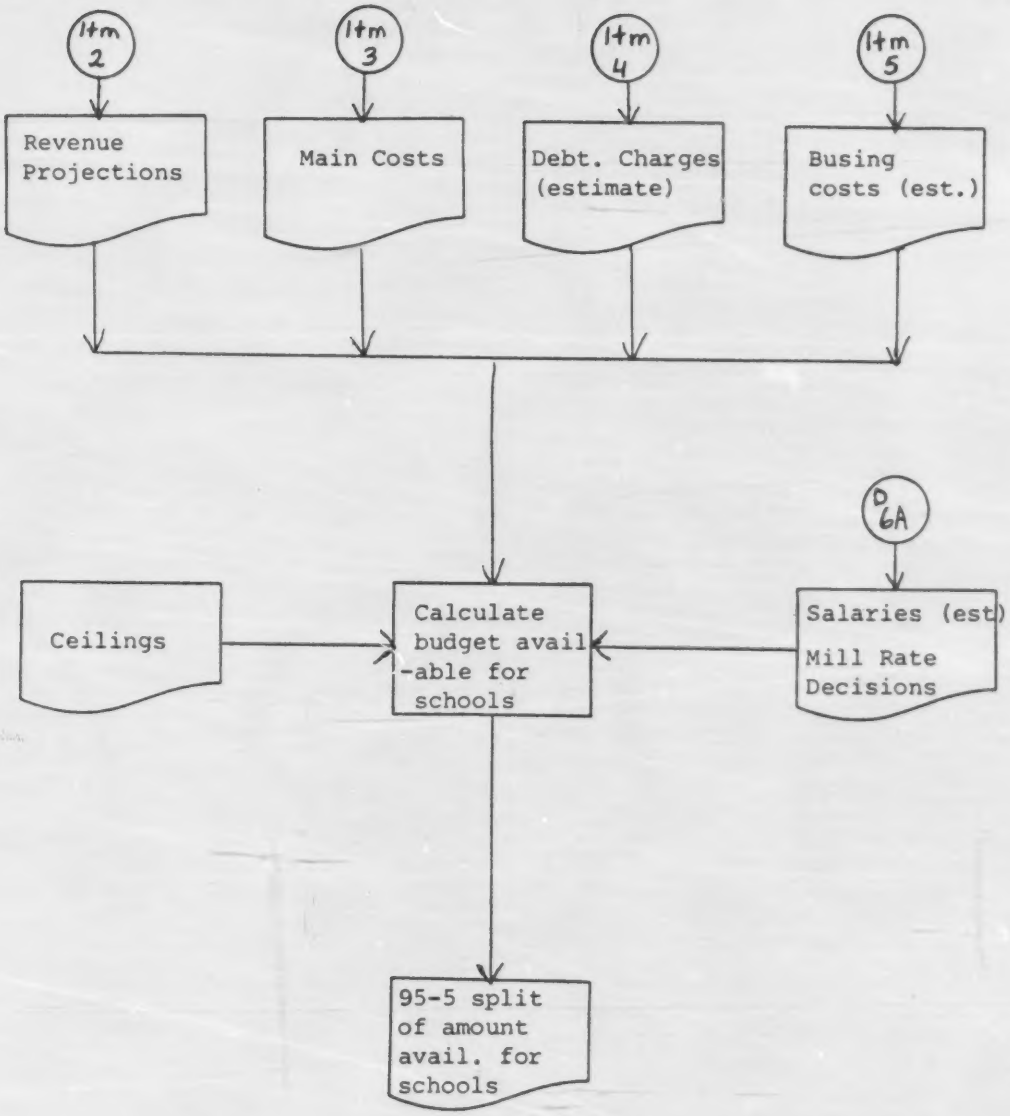


ITM 7

FACILITIES PROJECTIONS

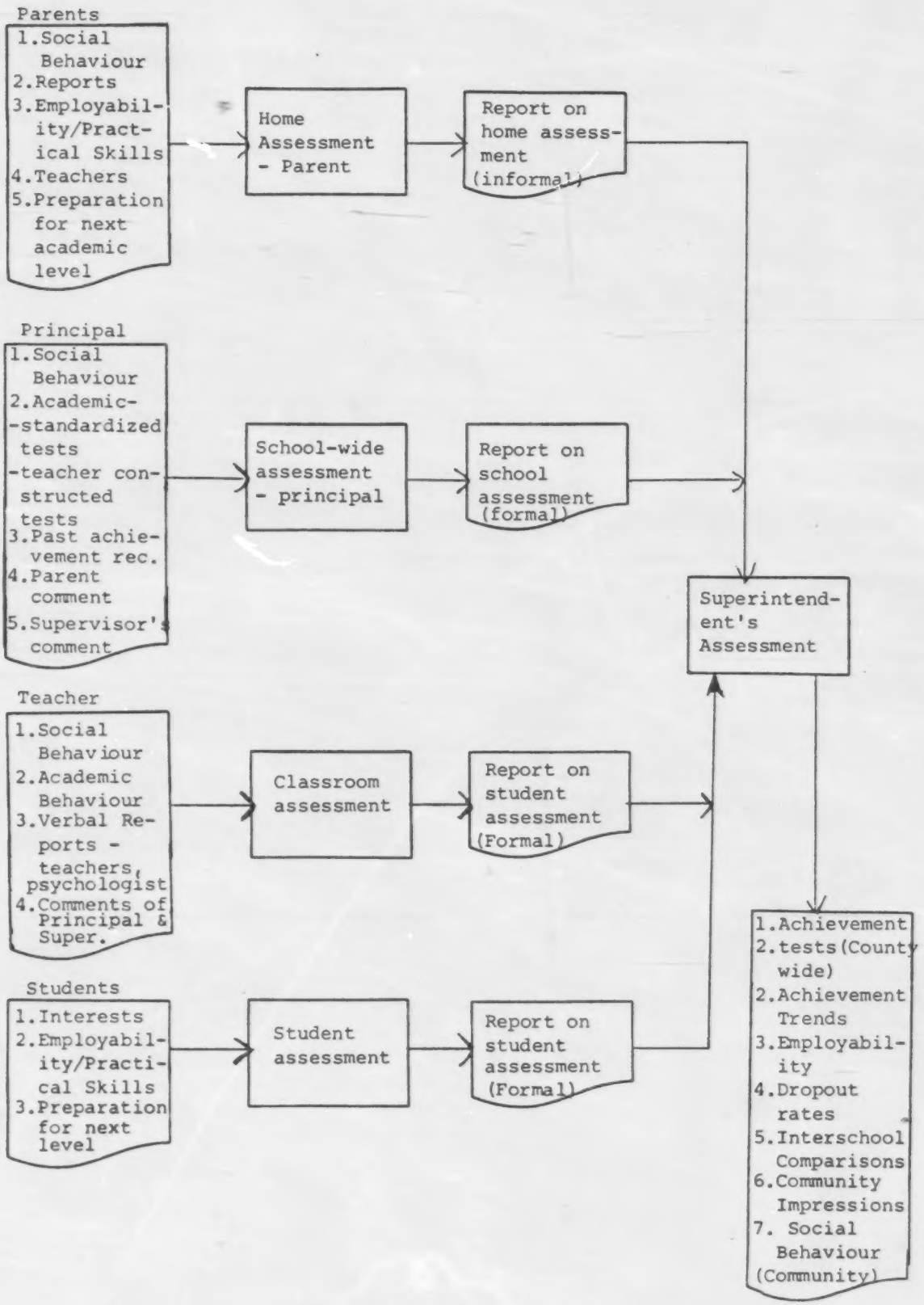


ITM 8 AMOUNT AVAILABLE FOR SCHOOLS

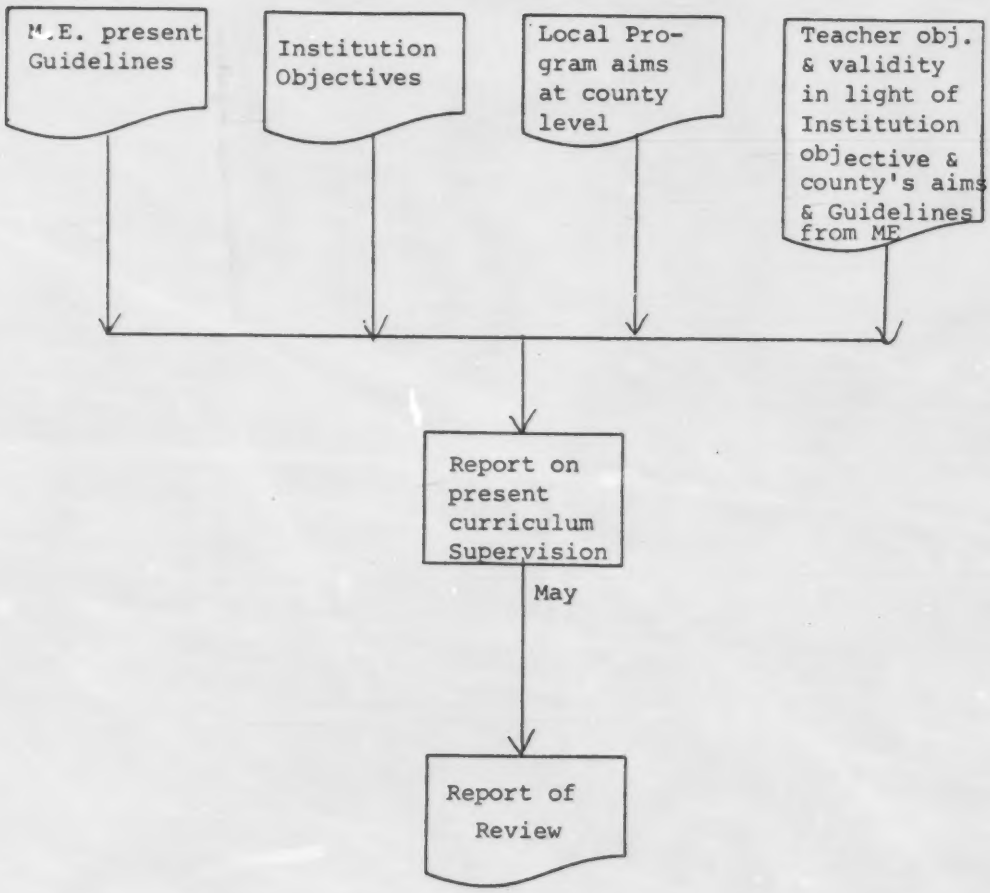


ITM 9

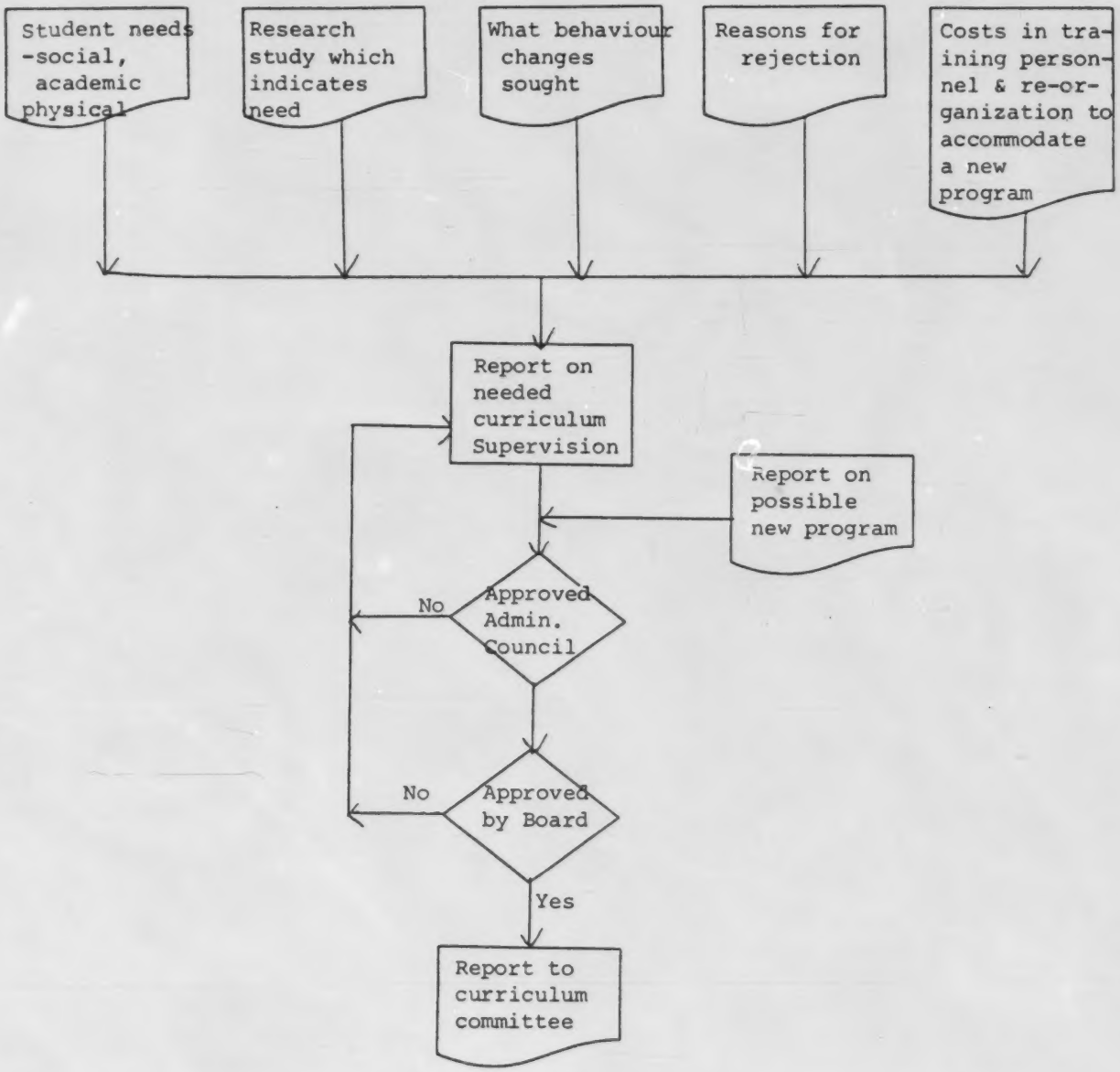
ASSESSMENT OF PRESENT PROGRAM



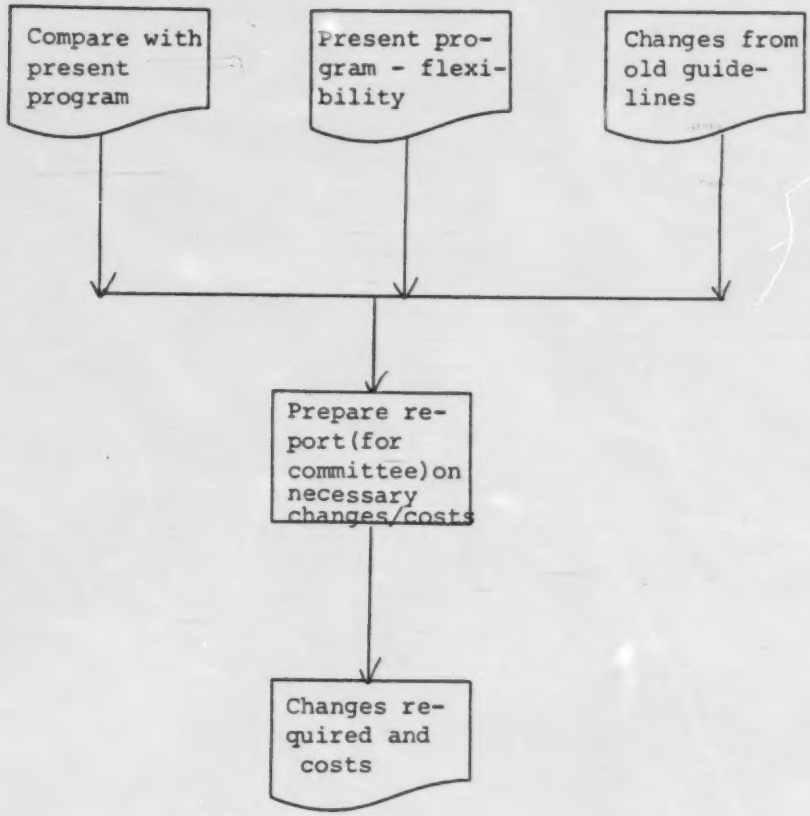
ITM 10 REVIEW OF PRESENT CURRICULUM IN PRINT


M.E. present Guidelines
Institution Objectives
Local Program aims at county level
Teacher obj. & validity in light of Institution objective & county's aims & Guidelines from ME
Report on present curriculum Supervision
May
Report of Review

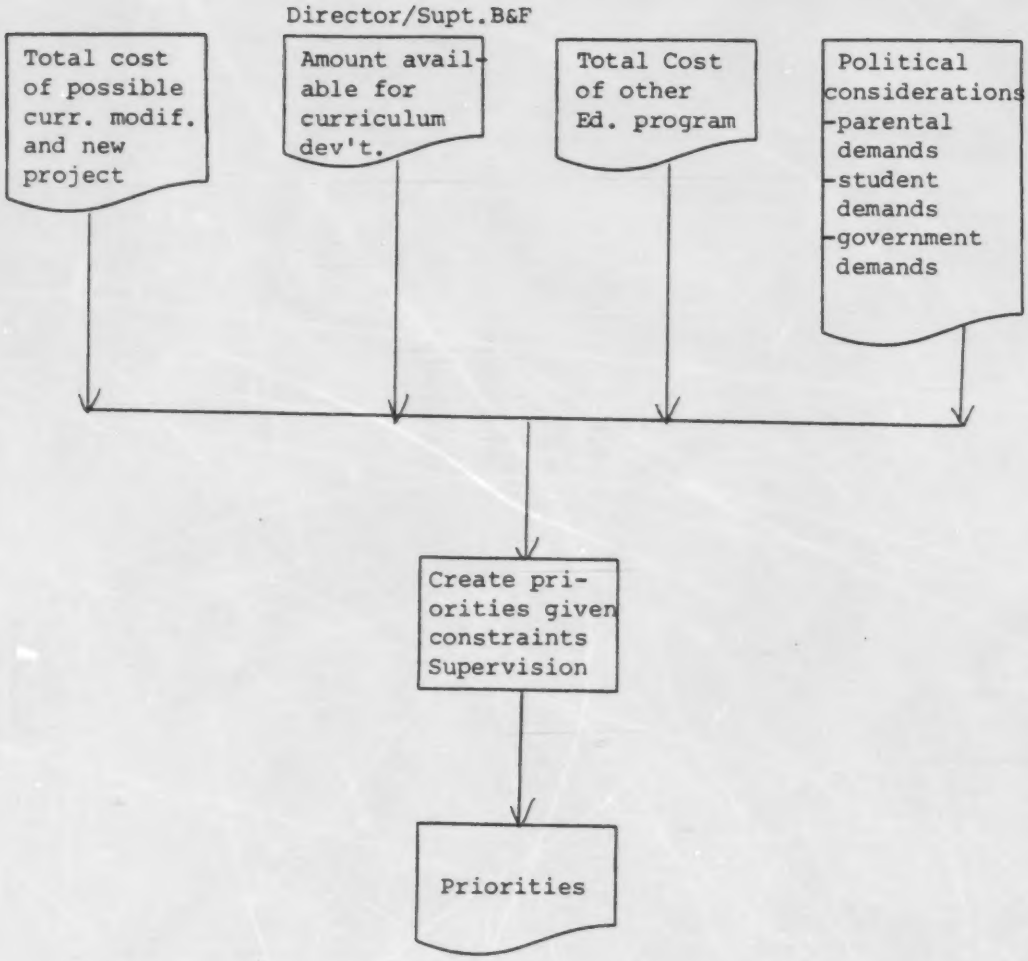
ITM 11 NEW CURRICULUM NEEDS



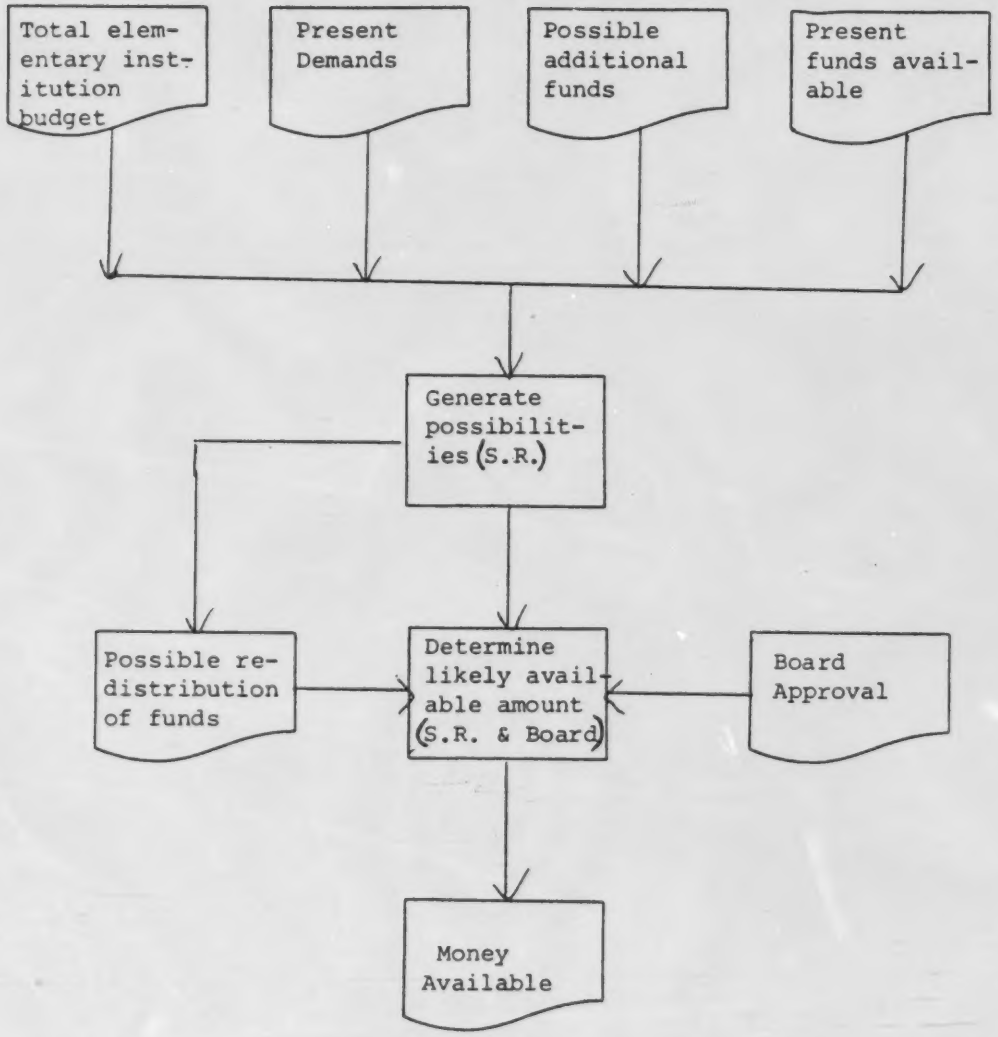
ITM 12 M.E. GUIDELINES


Compare with present program
Present program - flexibility
Changes from old guidelines
Prepare report (for committee) on necessary changes/costs
Changes required and costs

ITM 13 PRIORITY OF NEEDS

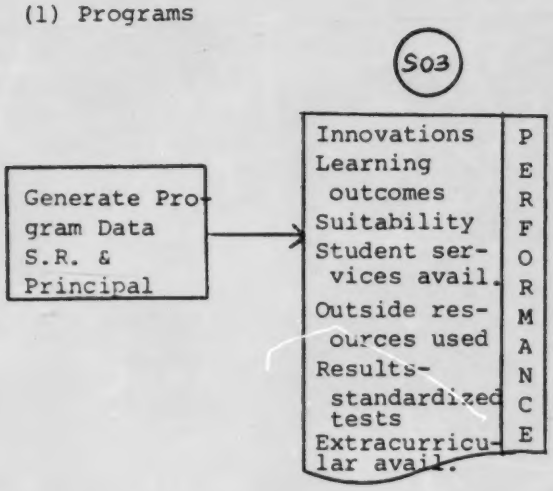


ITM 14 DETERMINE MONEY AVAILABLE FOR ELEMENTARY SCHOOL STAFFING

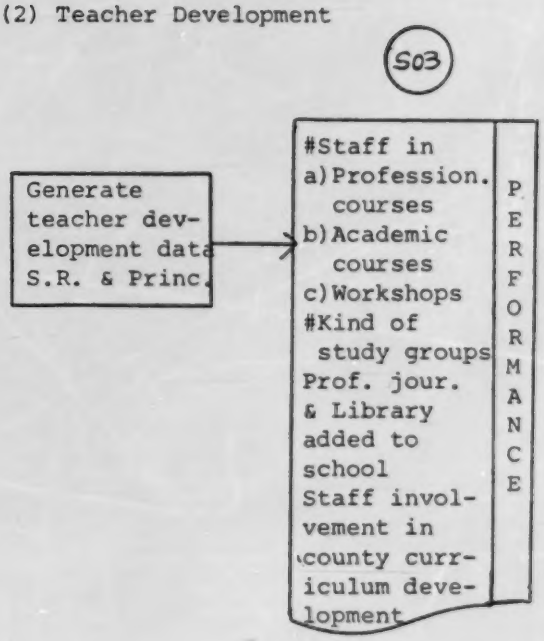


ITM 15

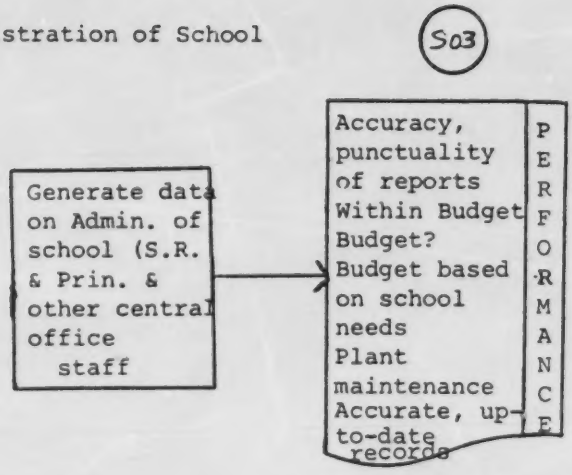
(1) Programs



(2) Teacher Development

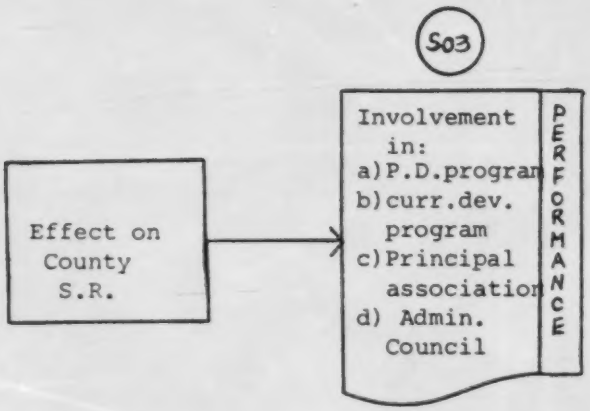


(3) Administration of School

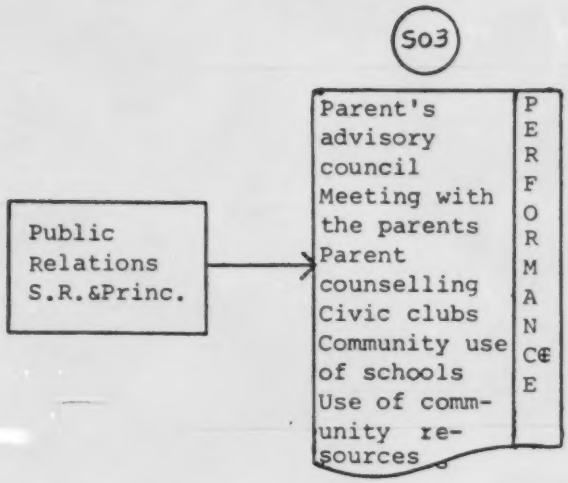


ITM 15.

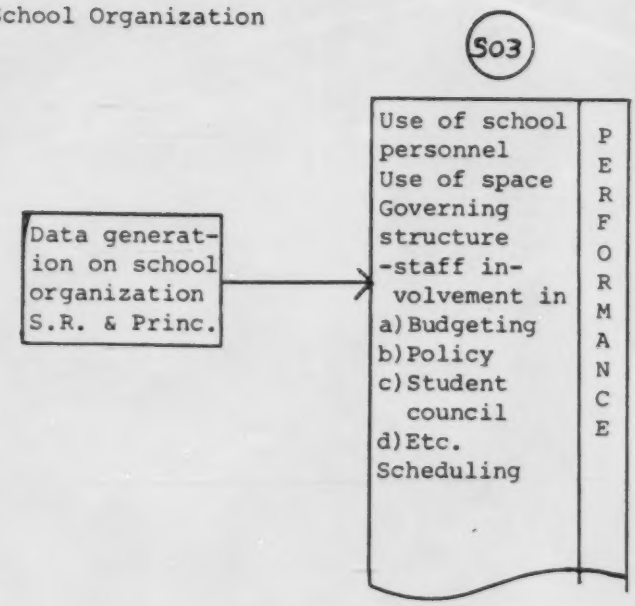
(4) Influence



(5) Public Relations



(6) School Organization



APPENDIX K

INFORMATION NEEDS FOR DECISIONS - BY BOARD FUNCTIONS

(1) ORGANIZATIONAL PLANNING

R01 Allocation of Director's Time

Documents

Objective of System

Time management of resources

Time by major area

Time management or personnel

Department of Educational Meeting

Teachers federation

OAEAO and other educational resources

Municipal officials

Prof. Development of opportunities for Director

Priorities for conflicting activities

Personnel by major areas

Previous years time spent

Time required by person

Estimated time for trustees

Estimated time for trustees association

Estimated time for chairman etc.

Estimated time for "in-tray".

Estimated time for board meetings

Estimated time for public

Tentative time schedule

R15 Board Office Accommodation

Documents

New staff (seemingly) required

Staffing report accommodation implication - internal

Staffing report - external

New methods and machines recommended

Feasible system goals

System goals

Management Committee recommendation

(2) ORGANIZATION - EXECUTIVE LEVEL

R02 Interpretation of - Board Policy
- Needs and Wants of Personnel;
How to Handle

Documents

Statement of problem

M.E. regulations

Law

Board policy

Analysis

(3) ADMINISTRATIVE RELATIONSHIPS

R03 Budget Preparation

Documents

Accummulation file on desired budget expense

Basic form from central office

Desired items with priority attached

Principals opinion

Superintendents prior assess. of needs

Estimated amount for main budget

Supervisor of plant - estimate of prices

Budget for main (implied)

Proposed main budget

Consumable/Cap. Alloc.

Principal's consumable and capital allocation requests

Goals of county system progress

Average per pupil allotments across province

P/T ratios by school

Econ. milieu inflation

Per pupil allotments

Needs of spec. ed. music etc.

Total req.

ME grant regulation

Assessment (by area)

Mill rate

Proposed budget

Revised Budget

Grants ME

Necessary Budget changes approved

R04/S20 How Should Budget Be Distributed Among Schools?

Documents

Amount available

Average in Ontario Boards - consumables

Cost of living

Consumables per pupil

Principals' priorities

Library situation re-equalization

Consumable categories by school

Principal's priorities capital allocation

Formula for capital equipment

Capital allocation budget totals

Priorities for whole system

Principals' opinions

Capital allocation budget

R05 Budget Control

Documents

Requests

Criteria (P.D.) policy on occasional teacher

Authorized expenditure - item area

Desired expenditures

Printouts by area--over/un-incl. encumbered funds

New requisitions - by area

Principal's request to overspend

Fixed amount authorized

R07 Striking County Pupil/Teacher Ratio

(a) Secondary

Definition of P/T ratio - trustee's council

P/T ratio by school

P/T ratio across province

Composition - size of schools

Special problems of schools - note special courses

Proportions of program

Reason for deviations

New P/T ratio by school

Extra personnel required

County P/T ratio

Approved T/PARA

(b) Elementary

P/T ratio across province

Projected enrollment

Size/Types of classes in each school next year

Itinerant teachers - special education, etc.

P/T ratio for each school next year

P/T ratio for county next year

R10 Organizational Changes

Documents

Organizational structure

Perceived problems

Deficiencies in structure

Revised organizational structure

R16 Items to be Referred to Board Solicitor

Documents

Evidence of incident, possibility of involving board in litigation

Case history (all corresponding documentation)

Solicitor's advice (in writing)

Recommendations to board

New advice of solicitor (in writing)

R18 Deciding Whether Items Should be Referred to Board of Handled by Administration

Documents

Problem

Presentation to Executive Committeee

Presentation to Federations

Presentation to Administration Council

External information source/other boards

Comments of Executive committee

Comments of federations

Comments of Administration Council

Committee recommendations

Board recommendations and policy

R19 Agenda Items

Documents

Item

Administration Council recommendation

Solicitor's advice

Report on item

Further study by officials

Recommendation on item

Fed. Executive's recommendations

Recommendation re appropriate action

(4) PERSONNEL

R06 Teacher Salary Negotiations

Documents

Teacher projections

Ceilings

Proposed salary and fringe benefits

Total costs salaries

Revenue to be generated from county

R08 Assessment of Secondary Principals

Documents

Desired changes in objectives--Director and Principal

System objectives

Objectives of System translated to secondary school

Job description of Principal

Relationship of Principal to objectives

What other boards do

Principals objectives

Knowledge from coursework ... etc.

Method of evaluation

The evaluation form for that year

Anecdotal file

Evaluation form updated mo.

Principal's self-evaluation

Relationship of principal to objective

Common evaluation report

Needed revisions of the procedure

System objective/Principal objective

Problem identification

R11 Staff Morale and Welfare Problems

Documents

Perceived problem

Perceptions of others on problem

Previous problems raised and personalities

New file on problems, etc.

R14 Leaves of Absence

Documents

Request from teacher

Regulations of leaves

Evaluation of teacher-principal's-supervisor's

Report on case

Admin. council recommendation

Fed. Executives opinion

Recommendation to director

(5) EXTERNAL RELATIONS

R13 Justification of Spending

Documents

Question on expenditure

Board authorization--minutes

Report on justification of spending

Recommendations to board

(6) PLANT PLANNING AND DEVELOPMENT

M12 Accommodation Requirements for Schools - Building Proposals

Documents

School population by area

Tentative boundary change

Frequency of prior changes

Space, personnel available in other schools

Effects on other schools

Effects on bus transporation and walking distances

Effect on socio-psych. makeup of children

Criteria - priorities

Tentative changes

Cost estimates

Political implications

Presentation to board - implications, needs, etc.

Decision

M09 Problems referred by Plant Supervisors, Special Education and Other Superintendents

Documents

Problem explanation

Problem specification

"01 Accommodation and Maintenance

Documents

Time schedule for year

What was to be done vs. what accomplished during the month (succ. vs. fail)

"07* Determination of Recommendations Regarding Capital Construction Forecasts

Documents

Previous Capital Construction Forecasts

Principals Report to M of E - Current enrollment statistics

Forecasted Enrollment from new subdivisions

M of E Capital Requirements Information

Advice from Superintendents

Facilities policy

Analysis of factors influencing facility requirements

Estimates of future enrollment (from all sources)

Estimated future facility requirements

Board Capital Construction Records

Communications with M of E Regional Office

Experience from previous forecasts

Probable effect of known factors, e.g., new subdivisions, new industries

Capital Construction forecast

(7) PLANT MANAGEMENT

M04 Determination of Recommendations Regarding Salary Proposals for Non-Teaching Staff

(i) Caretakers
(ii) Clerical and secretarial staff

Documents

(i) Caretaker wage schedule, benefits

Comparable schedules in other Boards and industry

(ii) Clerical and secretarial staff salaries

Teacher settlement

Caretaker settlement

Salaries in local offices, public service etc.

M09 Problems Referred by Plant Supervisors, Special Education, and Other Superintendents

Documents

Problem Explanation

(8) LIAISON

M02 Adult Education

Documents

List of interested people for principal

Interests of target population

Guidelines for staffing

Interested people for staff

Criteria for course offering

Cost by class of program

A desirable program and its staffing

Min. class size by possible class

Fees by possible class (tentative)

Amount to come off top of budget

Fees by possible class

Final response to program

Staffing final program

M03 Summer School:

Summer School Program (Secondary)

Documents

Program, fees (for candidate counties)

Program, fees (of selected county)

Estimated demand for course

Estimated transportation costs

Fee schedule for program

Demand for services

Bus arrangements

Summer School Program (Elementary)

Documents

Tentative demand for program

Program and costs

Where program will be given

Estimate of transportation costs

Fees-by offering

Demand for program

Bus arrangements

Interested teachers

Staffing decisions

Staffing requirements

M05 Staff Requirements for Special Projects Such as S.O.L.F.

Documents

Purpose of project

Orientation ("people" or "product")

Appointment of person in charge if applicable

Structure of project

Requirement for staffing in job description

Responsibility of budget

(9) INSTRUCTIONAL MEDIA DEVELOPMENT

M08 Personnel's Use of Resources

Documents

Material available (on hand)

Catalogues of material

New material available (on hand)

P.D. bulletin--new material available

Updated catalogue

S09 Resource Material Utilization/Involvement

Documents

Raw material

Annotated material

Effectiveness of next strata in getting people to use resources

Updated materials list

(Teachers) opinions on workshop goals, methods

Which teachers to involve in planning etc.?

Who will take part in workshop?

Courses available

Tentative demand for courses

Time people can take off

Courses which will have payment

Who can take what?

Personnel records (of those involved)

(10) ORGANIZATION - SCHOOL LEVEL

R20* Assessment of Experienced Teacher Applicants

Documents

Evaluations of other board - by whom
- criteria used
- assessment

Applications

Dufferin criteria

Assessment of applicants

S01 Staffing of Elementary Schools

Documents

Administration and service programs, descriptions and plans

Policy on requirements (staffing)

Skills, experience, interests of all people in system

Positions and skills required for implementation

Unmet personal needs

Skills, interest exp., etc. of applicants requirements

Experience and qualifications, and responsibility, costs

Costs of staffing

Money available

Positions to advertise

Applications, their skills, interests, B & P, etc.

Assignment of selected to schools

S05 Teacher Hiring

Documents

Staffing needs (interests, experience, skills required, etc.)

Applications--note of skills, experience, etc.

Recommended appointments

Positions advertised

S10* Competency of Experienced Teacher Applicants Following Consultation With A Superintendent of Another Board for Recommendation

Documents

Evaluations of other board - by whom
- criteria used
- assessment

Applications

Dufferin criteria

Assessment of applicants

(11) SUPERVISION AND EVALUATION

S02 Evaluation of Teachers (Probationary)

Documents

Principal's evaluation

Principal's recommendation

Superintendent's evaluaiton

Second Superintendents evaluation--if S.R. rejects

Recommendation to Director

S03 Evaluation of Principals (Elementary)

Documents

Criteria for evaluation

Data by criteria

Evaluation against criteria

Recommended P.D. program

ITM 15

S06 Promotions of Elementary Teachers

Documents

Openings available

Skill requirements of levels

Superintendent plus principals annual report on teachers

Responses to internal advertising

List of candidates (internal)

List of outside candidates

Short list of internal candidates

Recommendations

S07 Agenda Items - Education Committee
- Education Council

Documents

Agenda previous years

Topics not dealt with

Interim report given, final still expected

Completed topics

Requests for net topics

Tentative agenda, topics next year

Structure of monthly agenda

S08/M10 Necessary Changes in Attendance Areas

Documents

School pop. by area

Tentative boundary change

Freq. of prior changes

Space, personnel available in other schools

Effects on other schools

Effects on bus transportation and walking distances

Effect on socio-psych. make-up of children

Criteria - priorities

Tentative changes

Cost estimates

Political implications

Presentation to board--implications, needs, etc.

Decision

S11 Planning of Professional Development Programs

Documents

Resources--progress to date Administrative Council

Resources--progress to date Fed. Rep.

Resources--progress todate Department Heads, Principals, Vice-Principal's

Summary--resources - what's been done

Time required for regular duties (super/leader)

Needs and priorities of Principal

Advice of Administrative Council

Summary of needs and priorities

Residual time--priority, resources available

Total program (voluntary below county level)

Needs and priorities (Federal Reps.)

Targets for P.D.

Structure of new program (desirable)

S12 Resources for Professional Development Programs

Documents

Total program

Personnel resources available

Resources required from central budget

People responsible

Desirable resource material

Reports of books, articles, films, tapes, etc. from conferences

List of courses outside

Working papers at conferences

List of worthwhile material

S13 How to Keep Teachers Updated in Current Trends, Concepts and Practices

Documents

Present method - P.D. Bulletin
- supervision
- conferences
- intervisitation
- have their review book films etc.

Strengths, weaknesses of staff

Structure of new program

Modification if information dissemination system

S14 Performance Criteria for Principals/Vice-Principals

Documents

Last year's criteria

Criticisms by P's and V.P.'s

Criteria to be modified

Standards in industry

New set of criteria

Evaluations against criteria

(12) EDUCATIONAL PLANNING

S04 Curriculum Development

Documents

Assessment of present program (ITM 9)

New needs (ITM 11)

Priorities of needs (ITM 13)

Review of present curriculum in print (ITM 10)

M.E. guidelines (ITM 12)

Terms of reference for committees

Available personnel

Assignment of people to committees

S16 Assessment of Academic Program

Documents

Standardized test result (by class) - new results and previous years

Questions on anomalies

Answers (tentative) to question

Decision on appropriate action

Comparison of performance with previous years

Comparison of system against norm (by grade level)

S15 Program Modification

Last year's P.D. program

Goals of P.D./targets of P.D.

P.D. program in other counties

Feedback from principals

Changes in curriculum

Suggested modifications

(13) ACADEMIC BUDGET PROCESS

S17 Elementary School Budget/S18 Secondary School Budget

Documents

Board objectives

Special needs of students

Special staff requirements

Projected enrollment

Availability of monies

S19 Total Academic Budget

Documents

Advertising estimate

Professional development estimates

Cost of resources

Subscription costs - distribution cost, etc.

Estimate of cost for program modification
- materials
- new staff
- retraining staff

Curriculum development

Assessment of Academic program

School Budget - Elementary
- Secondary

Monies available

Preliminary Academic Budget

(14) FINANCE

B02*/R21 Determination of Items for Inclusion in Monthly Financial Reports to Board

Documents

Computer print-out sheets

Revenue and expenditure items

Balance sheet items

Suggestions from Accountant

Monthly Financial Report to Board

B03*/M07 Determination of Recommendations Regarding Capital Construction Forecasts

Documents

Previous Capital Construction Forecasts

Principals Report to M of E - Current enrollment statistics

Forecasted enrollment from new subdivisions

M of E Capital Requirements information

Advice from superintendents

Facilities policy

Analysis of factors influencing facility requirements

Estimates of future enrollment (from all sources)

Estimated future facility requirements

Board Capital Construction records

Communications with M of E Regional Office

Experience from previous forecasts

Probable effect of known factors, e.g., new subdivisions, new industries

Capital Construction forecast

B05*/M11 Determination of Information Required at Various Stages Regarding Applications for Building Approvals

Documents

Information required of - M. of E., O.M.B., D.E.C.A.C.

Direction of CMTE. (man. or Admoc.) re building required

Direction re architects

Local site requirement--from lawyer

Site information - final building plan

Debentures needed

Plans from architect

Information to M.E. re a) building proposal
b) sketch plans
c) working plans
d) final approval

Submission to O.M.B.

By-law required from O.E.C.A.C. for building approval

Final plans from architect

Tenders submitted

Information required progress to building committee

B06 Answers to Public in Answer to Requests for Information Regarding School Areas, Bus Routing, Accident Insurance Claim Problems, Sale of School Buildings, etc.

Documents

Inquiry

Board policy

Information from other sources - Superintendent of Curriculum instruction
- director
- plant
- M.E. - Peg. Office
Special Office
(Pertinent to problem)

- levy information
- school bookings

P08 Evaluation of Financial Accounting Department Staff

Documents

Previous evaluation forms

Revised forms for Supt. Plant

Revised forms for Director's Secretary

Completed evaluation

Performance Review Document

(15) TRANSPORTATION MANAGEMENT

B01*/M06 Answers to Public Regarding Requests for Changes in Operations of the Transportation System

Documents

Inquiry

Board Policy

Information from sources - sup. curr. instr.
- director
- plant
- M.E. - Regional Office
- Special Office (Perintent to problem)
- levy information
- school bookings

B10 Determination of Transportation Arrangements with Bus Operators - Routing, Loading, Payment

Documents

Present schedule

Arrangements in other boards

Suggestions of operators

Proposed revisions

Presentation to committee

Report to board

M06* Answers to Public Regarding Requests for Changes in Operation of the Transportation System

Documents

Inquiry

Board Policy

Information from other sources - sup. curr.
- director
- plant
- attn. office M.E. - Reg. Office
- Special Office
- levy information
- school bookings

(16) DATA PROCESSING

(17) PURCHASING AND STORES

P04 Determination and Review of Suppliers and Specifications for Purchase of Standard Supplies and Payments

Documents

Last year's quotation request form

Advice re quality/suggested addition or deletion of items

New quotation request form

Filled out O.R. form

Total orders

Quotations

Orders issued

(18) BUDGETING AND BUDGETARY CONTROL

B07* Consideration of Cost of Operation of Schools and Resultant Decisions Concerning What Should Be Done About Problem Indicated - Monthly Report Inclusion If Necessary

Documents

Print out for each school by function

Divergences from budget and causes (expenditure items)

Report (suggested action) to MAN. CMTE.

Report on Man. Cmte. decision

Recommendation to board

B09 Determination of Local Levies for Education

Documents

From other boards, ME/Grant information

Budget information from director and Man. Cmte.

Assessment information prior records by area

Assessment information (from assessment department) present assessment by area

Preliminary budget - estimate of local levy

Official grant regulations

Final assessment information

Final budget

Levies

B11 Budget Compilation

Documents

Methods of other boards

Wishes of Principals and trustees

Suggestions to Accountant

Form of presentation - previous years

Form in other boards

Opinion of Accountant

INFORMATION TRANSFORMATION MODULES

ITM 1 Enrolment Projections (Twice Yearly)

Documents

Previous projections vs. actual

Census - age specific

Survey results

Formulae re housing

Present student enrollment

Staging plans

Applications from outside

5 year project - 3 years in October; student by age and area

Expected number into and out of county

ITM 2 Revenue Projections (Twice Yearly)

Documents

Projected enrollment - total elementary - total secondary
Within county or outside county, expected number in and out of county

M.E. guess at grant structures

Present grant structure

Board policy re payment of fees into and out of county

5 year project total grants and tuition in - tuition out

ITM 3 Maintenance Cost Projections

Documents

Historical data on school maintenance

Standard costs

Facilities projection

Expected maintenance (formulae)

5 year projection - maintenance costs - 1 year actual

ITM 4 Debt Charge Projections

Est. Rev. for Salaries

Documents

Previous debts

Estimate revenue

Likely salaries

Other costs

Consumables - trend per pupil

5 year proj. - debt charges - est. rev. available

ITM 5 Bussing Costs Projection

Documents

Pupil/teacher ratio

Enrol. proj. by area

Formula of special vs. normal

Individual school needs

Para professional/teacher

Courses being taken

Special vs. normal demand

Grid

Retirements planned

Position of newly hired, past (same grid. structure is assumed)

Projection of grid structure

ITM 7 Facilities Projection

Documents

Enrol. proj. by area

Board policy K-8, 9-13 system

Present facilities inventory

School attendance boundaries

M.E. policy on facilities

Extra facilities req.

ITM 8 Amount Available for Schools (Jan.-Feb.)

Documents

Revenue projection

Ceilings

Main costs

Salaries (est.)

Mill rate decisions

Debt charges est.

Bussing cost est.

95-5 split of amount available for schools

ITM 9 Assessment of Present Program

Documents

Parents:

1. Social beh.
2. Reports
3. Employability practical skills
4. Teacher's comments
5. Preparation for next acad. level

Principal:

1. Social beh.
2. Academic - standard tests
   - teacher constructed tests
   - report cards
3. Past achievement records
4. Parents comments
5. Superintendent's comments

Teacher:

1. Social beh.
2. Academic beh.
3. Anecdotal reports of teacher
   - psychologists
4. Comments of principal/superintendents

Informal report on home assessment

Formal report on school assessment

Formal report on classroom assessment

Interests, employability pract. skills, prep. for next level

Report on student assessment

Superintendents' assessment

1. Achievement tests county wide
2. Achievement trends
3. Employability
4. Dropout rates
5. Interschool comparisons
6. Community impressions re-board
7. Social beh. - common level

ITM 10 Review of Present Curriculum in Print

Documents

M.E. present guidelines

Local program aims at county level

Institutional objectives

Teacher obj. and validity in light of inst. obj. and county's aims and guidelines from M.E.

Report of review

ITM 11 New Curriculum Needs

Documents

Student needs - social, academic physical

What behavioural changes sought

Research study which indicates needs

Reasons for rejection or acceptance

Costs in training personnel and reorganizing to accommodate a new program

Report on poss. new program

Report to curriculum committee

ITM 12 M.E. Guidelines

Documents

Compare with present program

Present program flexibility

Changes from old guidelines

Change req. and costs

ITM 13 Priority of Needs

Documents

Total cost of possible curr. mod. and new program

Total cost of other ed. prog.

Amount available for curr. dev.

Political considerations - parental demands
- student demands
- government demands

Priorities

ITM 14

Documents

Total elementary instit. budget

Possible additional funds

Present demands

Present funds available

Possible redistribution of funds

Board approval

Money available

ITM 15 Data by Criteria (Evaluation of Elementary Principals)

Programs

Documents

- Innovations
- Learning outcomes
- Suitability
- Student services available
- Outside resources used
- Test results
- Extra curricular available

→ Performance

Teacher Development

Documents

- Number of staff in a) professional courses
  - b) academic courses
  - c) workshops

→ Performance

- Numbers and kind of study groups
- Prof. journal and library added to school
- Staff involvement in [illegible]ty curriculum development

Administration of School

Documents

- Accuracy and punctuality of reports
- Within budget?
- Budget based on school needs
- Plant maintenance
- Accurate up-to-date records

→ Performance

Influence

Documents

Involvement in (a) Professional Development program

(b) Curriculum Development program

(c) Admin. Council

Public relations

Documents

Parents advisory council)
)
Meeting with the parents)
)
Parents counselling)
) Performance
Civic clubs)
)
Comm. use of schools)
)
Use of community resources)

School Organization

Documents

Use of school personnel)
)
Use of space)
)
Governing structure - staff involvement in)
) Performance
(1) budgeting)
)
(2) policy)
)
(3) student council)
)
(4) other)

Scheduling